

Chapter 6

Person Administration

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General Information

Introduction	<p>The Person Administration application is integrated into many of KDADS' other web applications to manage person information for that application. The Person Administration application stores demographic information, person roles, affiliations with other persons and other person-specific data. Depending on the role(s) assigned to the logged in user, additional tabs may display. This chapter will cover the use of Person Administration in KAMIS.</p>
Background	<p>All persons entered into KAMIS are located in the same Person Administration database table that is used by some of KDADS' other web applications. Because multiple roles can be assigned depending upon why the person is in KAMIS (customer, associate, assessor, case manager, etc.), there is no need to create a person more than once even if they serve multiple purposes in KAMIS (or any other web application.)</p> <p>There are security features in place that prevent users from accessing information they are not authorized to see.</p>
Requirements	<p>You must have the necessary security role for the Person Administration application, along with multiple roles specific to KAMIS that determine how much information you can see.</p>
Application Pages	<p>Person Search and Person Admin comprise the functional pages of Person Administration. KAMIS procedure requires looking up a person before creating the person record to avoid duplicate records whenever possible.</p>

Application Page/Navigation Tabs – Person Search

Introduction

Because KAMIS procedure requires looking up a person before creating them, a Search navigation tab is provided on the Person Administration main page.

Person Search Page

The Person Search page is where search criteria are entered to determine whether a customer record already exists. Its function is to do a person search for matching customer records, display the results, and provide a link to create a new customer if they do not appear in the search results.

The Person Search page displays when you click on the Person Search button on the main navigation menu bar, or the Person Search tab on the Person Administration main page.

Important Note: Person Search only searches for customer records. Searches for associates and other non-customer person records are covered in separate documentation.

Navigation Menu Bar

OR

Person Administration Page

TAKES YOU TO:

Navigation tabs

Search Criteria

Search Results

Create New Person

Home

Person Search

Person Admin

Person Forms

Case Log

Organizations

Org. Members

Share-Transfer workload

KAMIS ID: 39663

Name: GRIBBLE, LOIS

Customer Status: ACTIVE

More Person

Primary PSA JAYHAWK AREA AGENCY ON AGING

No Secondary PSAs

Person Search

Person Admin

Home

Associates and Affiliations

Person Search

Search

Search Selections

Person #

First Name (optional)

Last Name (Two character minimum)

SSN

Medicaid #

Date of Birth

Search

Reset Selections

done: 0:01

Search Results (Sorted by Last, First, Middle)

Created New Name Entry

Searched by Name; only customers within your AAA/CME and unassigned customers are displayed

Original Eff Date	Effective Date	Person #	First	Middle	Last	DOB	SSN	AAA/CME	Current Medicaid #	Customer Status	Update Person	View Forms
02/03/2015	02/03/2015	200353717	JAMEY		JETSON	03/27/1971	333-27-1971	Primary 3		ACTIVE		
03/18/2015	03/18/2015	200353720	JEB		JETSON			Primary 3		ACTIVE		
02/03/2015	02/16/2015	200353716	JED	J	JETSON	02/28/1968	222-28-1968	No AAA/CMEs found				

row(s) 1 - 3

If the search results do not display the customer you are searching for, you can proceed with creating a new person.

Application Page/Navigation Tabs – Person Admin

Person Admin Page

The Person Admin page is where a new person record is created, and where an existing person record can be viewed or updated.

The Person Admin page displays when the user:

- Clicks on the **Create New Name Entry** button on the Person Search page (a blank form displays)
- Clicks on the desired **Update Person** icon in Search Results on the Person Search page (if the user has the proper security access to the Person Admin record)
- Clicks on the **Person Admin** button in the main navigation menu bar at the top of the KAMIS window (the button displays if a person record was previously accessed)

Original Eff Date	Effective Date	Person #	First	Middle	Last	DOB	SSN	AAA/CME	Current Medicaid #	Customer Status	Update Person	View Forms
02/03/2015	02/03/2015	200353717	JAMEY		JETSON	03/27/1971	333-27-1971	Primary 3		ACTIVE		
03/18/2015	03/18/2015	200353720	JEB		JETSON			Primary 3		ACTIVE		

The Person Admin page contains secondary navigational tabs, some of which display depending on the security access roles assigned to the logged-in user.

Primary Navigational Tab: Person Admin 2

Secondary Navigational Tabs: Home 2, Associates and Affiliations 31, IDD Additional Info 32, SED Additional Info 34

These appear only when the user has the proper security access

Person Administration

NAME: (first) (middle) (last)

**Enter Middle name or initial if known

Nickname:

* Date of Birth: * Effective Date: 03/16/2015

* SSN: Date of Death: Age:

* Create Person Source: KAMIS

Initial Role: --

* Gender: -- Veteran: --

Marital Status: -- Spouse of Veteran: --

The yellow tabs indicate which page is currently displayed.

Person Admin Secondary Tabs

The Person Admin primary navigational tab contains the following secondary tabs:

- **Home** – Basic demographic information, HCBS waiver information, Person status, Person roles
- **Associates and Affiliations** – Lists other persons associated with the particular customer record. Also shows Share/Transfers History.
- **[Other] Additional Info** – If the user has the appropriate security access, tabs for other waiver information will display.

**Person Admin/
Home**

Region	Contents
Person Administration	Demographic information – including name, DOB, SSN, gender, marital status
Ethnicity/Language	Race, ethnicity, languages
Person Aliases	The person's known aliases. Used mostly for Background Checks, but can be entered for general information.
Alert	Text area for entry of pertinent information about a customer. Alert text appears on the Customer Forms List. <i>Do not enter PHI that violate HIPAA privacy rules.</i>
Address Information	Address and phone number history. Multiple address types can be entered: residential, business, mailing, etc.
HCBS Waiver Eligibility Information	Customer Medicaid ID number and eligibility information
HCBS Wait List Info	Displays the waiting list status of customers on waivers that have waiting lists.
Person Status	Status can be Active, Inactive, or Deceased. Note: Only persons with the Customer role have a status assigned.
Person Roles	How the person is defined in the system; how the record is used.

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Secondary Navigation Tabs – Person Admin/Associates and Affiliations

Person Admin/ Associates and Affiliations

The Person Admin/Associates and Affiliations secondary tab contains the following information:

Region	Contents
Listing of Associates	Contains information on people associated to this person. Note: Associates are usually only found on customer records.
Customer Roles at Organizations	If this person is associated with a particular organization found in KAMIS, the organization will be listed here. Note: Organization affiliations are usually only found on person records with case manager, assessor, and other non-customer roles.
KDHE WORK Program Information	This region is not currently being used.
Share-Transfer History	Any Shares or Transfers that have been completed for the customer will appear here. Note: Only customer records have Share-Transfer History.

Person Search

Person Admin

Home

Associates and Affiliations

IDD Additional Info

SED Additional Info

List Associates

Modify	First	Middle	Last	Relationship	Associate Type	Effective Date	Term Date
	JED	J	JETSON	BROTHER	EMERGENCY CONTACT	02/01/2015	-

1 - 1

First Name Last Name

Created by TRAINING02 on 02/03/2015. Last modified by TRAINING02 on 02/16/2015.

Customer Roles at Organizations

No Entity Roles found.

KDHE WORK Program Information

no data found

Share-Transfer History

No Shares or Transfers found

Secondary Navigation Tabs – Person Admin/IDD Additional Info

Person Admin/ IDD Additional Info

This tab will display only if the logged in user has the security roles granting access to IDD waiver information.

The Person Admin/IDD Additional Info secondary tab contains the following information for customers on the IDD waiver:

Region	Contents
Disabilities Information	Identifies various aspects of the customer's intellectual and/or developmental disability.
Residential & Day Program Information	Identifies customer's residential status, selected from a pre-defined list, and any day programs he/she attends.

The screenshot shows the 'Disabilities Information' form. At the top, there are navigation tabs: 'Person Search', 'Person Admin' (selected), 'Associates and Affiliations', 'IDD Additional Info' (selected), and 'SED Additional Info'. The form is titled 'Disabilities Information' and contains several sections:

- Identified Disabilities:** A list of checkboxes for 'AUTISM', 'CEREBRAL PALSY', 'EPILEPSY / SEIZURE DISORDER', 'MENTAL RETARDATION', and 'OTHER'. To the right of the list are up and down arrow icons.
- Other Description:** A text input field.
- Primary Disability:** A dropdown menu with '--' selected.
- Special Population:** A list of checkboxes for 'CIP', 'CHILD IN CUSTODY', 'SELF-DIRECTED CARE', 'SELF-DETERMINATION', and 'SPECIAL CARE RATE'. To the right of the list are up and down arrow icons.
- Psychiatric Diagnosis:** A list of checkboxes for '290.0_1 - Dementia-Alzheimer's Type,W/Late Onset,Uncomplicated', '290.0_2 - Dementia-Alzheimer's Type,Late Onset,Uncomplehav.Dis', '290.10_1 - Dementia Due To Creutzfeldt-Jakob Disease', '290.10_2 - Dementia Due To Pick's Disease', and '290.10_3 - Dementia,Alzheimer's Type,W/Early Onset,Uncompleha'. To the right of the list are up and down arrow icons.
- Intellectual Assessment:** A dropdown menu with '--' selected.
- Hearing Assessment:** A dropdown menu with '--' selected.
- Vision Assessment:** A dropdown menu with '--' selected.

At the bottom of the form are 'Cancel' and 'Save' buttons.

The screenshot shows the 'Residential & Day Program Information' form. It contains the following sections:

- County of Origin:** A dropdown menu with '--' selected.
- Residential Status:** A dropdown menu with '--' selected.
- Day Programs:** A list of checkboxes for various day programs:
 - ATTENDS SCHOOL IN A CLASSROOM 50% OR MORE OF THE DAY WITH PEOPLE WHO ARE NOT MR/DD
 - ATTENDS SCHOOL IN A CLASSROOM LESS THAN 50% OF THE DAY, WITH PEOPLE WHO ARE NOT MR/DD
 - GENERIC COMMUNITY ACTIVITIES LESS THAN 20 HOURS PER WEEK
 - GENERIC COMMUNITY ACTIVITIES 20 HOURS OR MORE PER WEEK
 - WORK ENVIRONMENT DESIGNED FOR PERSONS WITH MR/DD LESS THAN 20 HOURS PER WEEK
 - WORK ENVIRONMENT DESIGNED FOR PERSONS WITH MR/DD 20 OR MORE HOURS PER WEEK
 - COMPETITIVE EMPLOYMENT LESS THAN 20 HOURS PER WEEK
 - COMPETITIVE EMPLOYMENT 20 OR MORE HOURS PER WEEK
 - AGENCY BASED NON-WORK ACTIVITIES LESS THAN 20 HOURS PER WEEK
 - AGENCY BASED NON-WORK ACTIVITIES 20 OR MORE HOURS PER WEEK
 - OTHER
- Day Program Other Description:** A text input field.

Secondary Navigation Tabs – Person Admin/SED Additional Info

Person Admin/ SED Additional Info

This tab will display only if the logged in user has the security roles granting access to information related to customers on the SED waiver.

The Person Admin/SED Additional Info secondary tab contains the following information for customers on the SED waiver:

Region	Contents
SED Program Date Information	Contains dates having to do with eligibility that are required for completing the Service Authorization. The dates entered here populated the matching fields in the SED Assessment.
Customer Obligation Listing	If the customer has a financial obligation for any services provided, the dollar amount is entered here. This information is used in the Service Authorization.

Person Search

Person Admin

Home

Associates and Affiliations

IDD Additional Info

SED Additional Info

SED Program Date Information

* Family Choice Date: 03/01/2015

* Clinical Eligibility Date: 03/01/2015

SED Compliance Date:

Cancel Save

Customer Obligation Listing

Edit	Waiver	Obligation Amt	Obligation Effective Date	ObligationTerm Date
	SEVERE EMOTIONAL DISTURBANCE	154	03/01/2015	05/29/2015

1 - 1

Add Obligation Information

Creating a New Person - Overview

Introduction

This section is an overview of the steps required for entering a new person into KAMIS using Person Administration.

Person Search

If creating a new person for KAMIS, the first step is to search for the person to determine if they already exist in Person Administration. You can search by one or more parameters:

- Person Number – numeric only
 - First Name
 - Last Name – Must enter at least 2 characters
 - SSN
 - Medicaid ID #
 - Date of Birth
-

Person Search Tips

Suggested search parameters:

- Person number (KAMIS ID number)
- Last name and Date of Birth
- Social Security Number
- Medicaid ID #
- First name and last name (this search will only find matches within the logged in user's organization)

If searching by all available parameters and the person is not found, re-do the search with fewer parameters. It is not uncommon for a person to be in the system without a social security number or Medicaid number, as those are not required fields in KAMIS.

Note: See the Person Search chapter in the KAMIS User Manual for detailed information on Person Search rules. Reminder: The Person Search function only searches for customer records. Associate searches are covered later in this chapter.

Create New Person

If the person search does not find the customer ('No Data found' result), proceed with creating a new person using the 'Create New Name Entry' button.

Completing a Search Prior to Creating Person

How To

Follow the steps in the table below to search for a customer in KAMIS:

Step	Action	Result
1.	On the KAMIS Home Page, or the Person Search page, enter the desired Search Criteria	Search fields are populated.
2.	Click on the Search button	When complete, a list of the matches found or a 'no data found' message will display.
3.	If the desired customer is in the Search Results, click on the Update Person icon.	The customer's Person Administration page displays. You do not need to create a new person.

Person Search





Search

Search Selections

Person # First Name (optional) Last Name (Two character minimum) SSN Medicaid # Date of Birth **Search** Reset Selections done: 0:04

Search Results (Sorted by Last, First, Middle) [Create New Name Entry](#)

Searched by Name; only customers within your AAA/CME and unassigned customers are displayed

Original Eff Date	Effective Date	Person #	First	Middle	Last	DOB	SSN	AAA/CME	Current Medicaid #	Customer Status	Update Person	View Forms
02/03/2015	02/03/2015	200353717	JAMEY		JETSON	03/27/1971	333-27-1971	Primary 3		ACTIVE		
02/03/2015	02/16/2015	200353716	JED	J	JETSON	02/28/1968	222-28-1968	No AAA/CMEs found				

row(s) 1 - 2

- | | | |
|----|---|---|
| 4. | If the customer is not in the Search Results, or you get a 'no data found' message... | you will create a new customer record as described in the next section. |
|----|---|---|

Search Selections

Person # First Name (optional) Last Name (Two character minimum) SSN Medicaid # Date of Birth **Search** Reset Selections done: 0:05

Search Results (Sorted by Last, First, Middle) [Create New Name Entry](#)

Searched by Name and Birth Date

No Data found

Searching by name only in case DOB entered wrong:

Search Selections

Person # First Name (optional) Last Name (Two character minimum) SSN Medicaid # Date of Birth **Search** Reset Selections done: 0:01

Search Results (Sorted by Last, First, Middle) [Create New Name Entry](#)

Searched by Name; only customers within your AAA/CME and unassigned customers are displayed

No Data found

Create a New Person

Introduction

This section explains how to create a new person in Person Administration. It will cover:

- Creating the Person Record
- Duplicate Records

Create New Name Entry

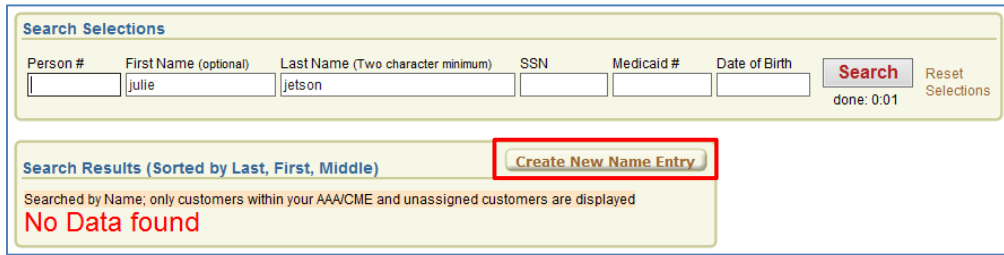
If Person Search does not show any entries that match your search criteria, you can proceed with creating a new person record using the **Create New Name Entry** button on the Search Results page.

Important Note: These instructions are written based on a customer being created. If the person is not a customer, they can be created using this process, but be aware that the Person Search function will only find person records created with a Customer role, so accessing a non-customer's person record must be accomplished through other functions.

The red asterisks (*) denote a field that is required for some applications, but not necessarily all apps that use Person Administration. However, if the person is a customer, it is recommended that you enter as complete information as possible. Even though some of these fields are not initially required in KAMIS, some forms cannot be saved and/or approved without them.

How to

Follow the steps in the table below to create a new person.

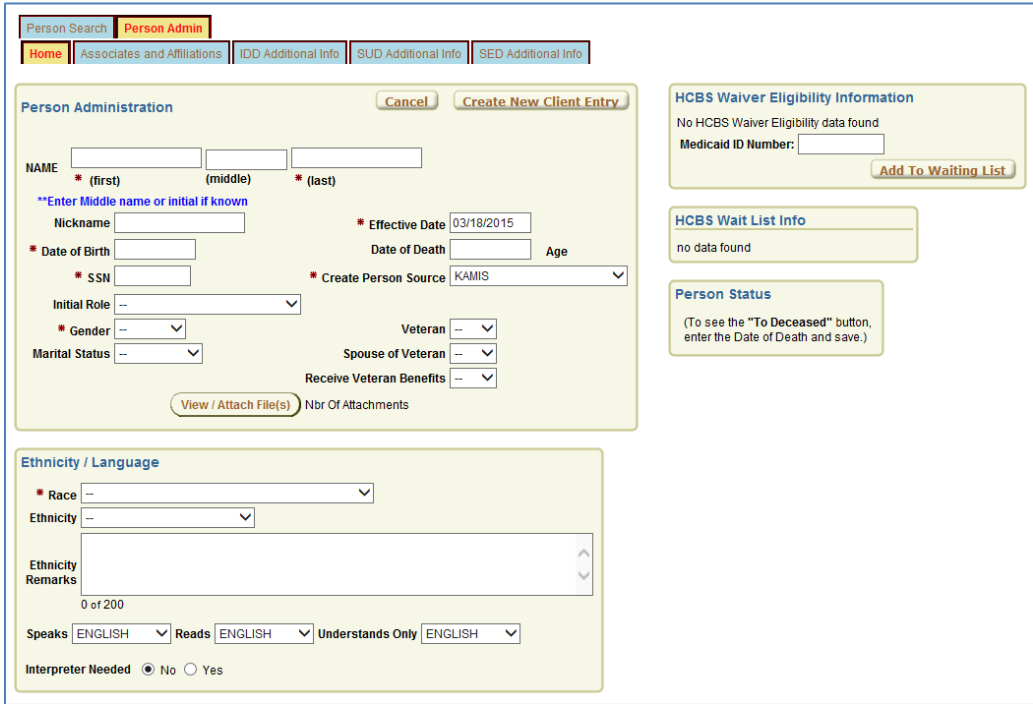
Step	Action	Result
1.	Click on the Create New Name Entry button in the Search Results region.	 The screenshot shows the 'Search Selections' section with input fields for Person #, First Name (optional), Last Name (Two character minimum), SSN, Medicaid #, and Date of Birth. The 'Search' button is highlighted. Below it, the 'Search Results (Sorted by Last, First, Middle)' section shows 'No Data found' and a 'Create New Name Entry' button, which is highlighted with a red box.

Continued on next page

Create a New Person, continued

How to

continued

Step	Person Administration Region action	Result
		The Person Admin/Home page displays.
	 <p>The screenshot shows the 'Person Admin' form. At the top are tabs: 'Person Search', 'Person Admin' (selected), 'Home', 'Associates and Affiliations', 'IDD Additional Info', 'SUD Additional Info', and 'SED Additional Info'. The 'Person Administration' section includes fields for NAME (first, middle, last), Nickname, Effective Date (03/18/2015), Date of Birth, Date of Death, Age, SSN, Create Person Source (KAMIS), Initial Role, Gender, Marital Status, Veteran status, Spouse of Veteran, and Receive Veteran Benefits. There are buttons for 'Cancel', 'Create New Client Entry', and 'View / Attach File(s)'. To the right are sections for 'HCBS Waiver Eligibility Information' (Medicaid ID Number, Add To Waiting List), 'HCBS Wait List Info' (no data found), and 'Person Status' (To see the "To Deceased" button, enter the Date of Death and save.). Below is the 'Ethnicity / Language' section with fields for Race, Ethnicity, Ethnicity Remarks, Speaks, Reads, Understands Only, and Interpreter Needed.</p>	
2.	<p>Enter the person's legal First and Last name.</p> <p>If known, enter the Middle name or initial (not required).</p> <p>The Nickname field can be used to enter the person's nickname or their 'goes by' name.</p>	<p>In general, do not use punctuation when entering information in Person Admin fields.</p> <p>Exception: If a person's legal first name is initials only, it is permissible to can enter the first name as initials only – for example, A.J. If not, use the nickname field to enter A.J. and enter the legal first name in the First Name field.</p>
3.	Enter the person's Effective Date .	Defaults to the current date, but if there is an assessment that needs to be entered with an assessment date that is before the current date, change the Effective Date to the assessment date.
4.	Enter the person's Date of Birth .	The slashes will be inserted automatically.
5.	If known, enter the person's Social Security Number .	Enter numbers only; do not enter the dashes.
6.	Select KAMIS as the Create Person Source .	It should be the default choice
7.	Select the Initial Role for this person.	If this person is a customer but will have additional roles, choose Customer as the initial role so you can search for the record again later using Person Search.

Continued on next page

Create a New Person, continued

How to

continued

Step	Person Administration Region action	Result
8.	Select the Gender from the drop-down list.	
9.	If known, select the Marital Status of the person.	
10.	If known, complete the Veteran information.	
	Ethnicity/Language Region action	Result
11.	Select the Race of the person.	
12.	Select the Ethnicity of the person.	
13.	Make any other changes as necessary to the Ethnicity/Language region as desired.	Not required
	Other Regions action	Result
14.	If this is a Medicaid customer, enter their Medicaid ID Number in the 'HCBS Waiver Eligibility Information' region.	Enter only the number - no spaces or dashes.
15.	To save the new person record, click on the Create New Client Entry button at the top of the Person Administration region.	<p>The person record is successfully saved, a unique Person Number is assigned, and the screen displays additional regions (see screen image below.)</p> <p>OR</p> <p>A Duplicate Entry is found and requires further action before the record can be saved successfully. See the next section for instructions to complete the new client entry if possible duplicate entries are found.</p>

Continued on next page

Create a New Person, continued

Completed Person Admin page

The screenshot shows the 'Person Administration' web form for a person named JULIE JETSON. The form is divided into several sections:

- Customer Header:** KAMIS ID: 200353721, Name: JETSON, JULIE, Customer Status: ACTIVE, Primary PSA: NORTHWEST KANSAS AAA. An annotation points to this header with the text: "Customer header information containing new person's KAMIS ID (person number) and other information."
- Person Administration:** Contains fields for Name (JULIE, JETSON), Nickname, Date of Birth (03/27/1971), Date of Death, SSN (333711927), Gender (FEMALE), Marital Status (SINGLE), and various checkboxes for Veteran, Spouse of Veteran, and Receive Veteran Benefits. It also has a "View / Attach File(s)" button.
- Ethnicity / Language:** Includes fields for Race (REPORTING 2 OR MORE RACES), Ethnicity (NOT HISPANIC OR LATINO), Ethnicity Remarks, and language preferences (Speaks, Reads, Understands Only).
- Alert:** A section for Remarks with a "Save Alert" button.
- Address Information:** A section for adding new addresses with an "Add New Address" button.
- HCBS Waiver Eligibility Information:** A section for adding Medicaid ID numbers with an "Add To Waiting List" button.
- HCBS Wait List Info:** A section for waiting list information.
- Person Status:** A section for changing status with a "To Inactive" button. An annotation points to this section with the text: "New regions display once person record is saved."
- Person Roles:** A table showing roles assigned to the person. It has a "Create New Role" button and a "row(s) 1 - 1 of 1" indicator.

Role Type	Effective Date	Terminate
CUSTOMER	03/18/2015	X

New Regions

- **Address Information** – add residential, business, mailing addresses here.
- **Person Status** – A newly created person with a Customer role will automatically be in 'Active' status. The Person Status region is used to change the status to Inactive or Deceased. Only customers have a Person Status.
- **Person Roles** – All roles assigned to a person record display here.

These regions will be covered later in this chapter.

Possible Duplicate Record Found

Introduction

No person should be entered more than once into Person Administration. To help reduce the number of duplicate entries, a comparison is done when a new person record is created, or when the Social Security Number or Date of Birth is changed or added to an existing person record.

If the comparison finds an existing person record that already has the new person's last name, social security number, or date of birth, the Duplicate Name Results region appears.

When a potential duplicate person record is found, you must determine if it is the same person as the one you are attempting to create.

Duplicate Name Results
[DISPLAY DUPLICATES](#) ☐ Override Duplicate Entry

The Person you are attempting to add or modify may be a duplicate. Please validate you are not entering the same person by clicking the [DISPLAY DUPLICATES](#) button. Then check [OVERRIDE DUPLICATE ENTRY](#) checkbox to override the check and save the person information

[Person Search](#)
[Home](#) [Associates and Affiliations](#)

Person Administration [Cancel](#) [Create New Client Entry](#)
NAME
* (first) (middle) * (last)
****Enter Middle name or initial if known**
Nickname * Effective Date
* Date of Birth Date of Death Age
* SSN * Create Person Source
Initial Role
* Gender Veteran
Marital Status Spouse of Veteran
Receive Veteran Benefits
[View / Attach File\(s\)](#) Nbr Of Attachments

HCBS Waiver Eligibility Information
No HCBS Waiver Eligibility data found
Medicaid ID Number:
[Add To Waiting List](#)

HCBS Wait List Info
no data found

Person Status
(To see the "To Deceased" button, enter the Date of Death and save.)

Ethnicity / Language
* Race
Ethnicity
Ethnicity Remarks
0 of 200
Speaks Reads Understands Only
Interpreter Needed ☒ No ☐ Yes

Continued on next page

Possible Duplicate Record Found, continued

How To

Follow the steps in the table below to review a possible duplicate record.

Step	Action	Results
1.	<p>Previous section's last step was to save the new person record.</p> <p>When the Create New Client Entry button was clicked, a check was done for possible duplicate person records within Person Administration.</p>	<p>A duplicate entry is found and requires further action:</p> <p>The Display Duplicate button displays, with a disabled 'Override Duplicate Entry' checkbox next to it.</p> <p>The duplicate check compares the following:</p> <ul style="list-style-type: none"> • First Name and Last Name • Social Security Number • Last name and DOB
2.	Read the Duplicate Name Results message that appears in red below the 'Display Duplicates' button.	The message provides directions for how to deal with the duplicate name results.

Duplicate Name Results

☐ Override Duplicate Entry

The Person you are attempting to add or modify may be a duplicate. Please validate you are not entering the same person by clicking the DISPLAY DUPLICATES button. Then check OVERRIDE DUPLICATE ENTRY checkbox to override the check and save the person information

3.	Click on the Display Duplicates button.	The potential duplicate person records display. You must display the duplicates before the 'Override Duplicate Entry' checkbox can be used.
----	--	---

Duplicate Name Results

ORIGINAL EFF DT	EFF DT	KAMIS ID	FIRST	MIDDLE	LAST	DOB	SSN	AAA/CME	CURRENT MEDICAID #	Customer Status
02/03/2015	02/03/2015	200353717	JAMEY		JETSON	03/27/1971	333-27-1971	Primary 3		ACTIVE
03/18/2015	03/18/2015	200353721	JULIE		JETSON	03/27/1971	333-71-1927	Primary 3		ACTIVE

row(s) 1 - 2

☐ Override Duplicate Entry

The Person you are attempting to add or modify may be a duplicate. Please validate you are not entering the same person by clicking the DISPLAY DUPLICATES button. Then check OVERRIDE DUPLICATE ENTRY checkbox to override the check and save the person information

In this case, the duplicates were matched on last name and date of birth.

Person Search

Person Administration

NAME: JULIE (first) (middle) JETSON (last)

**Enter Middle name or initial if known

Nickname:

* Effective Date: 03/19/2015

* Date of Birth: 03/27/1971

Date of Death: Age:

* SSN: 333271971

* Create Person Source: KAMIS

HCBS Waiver Eligibility

No HCBS Waiver Eligible

Medicaid ID Number:

HCBS Wait List Info

no data found

Continued on next page

Possible Duplicate Record Found, continued

How To

continued

Step	Action	Results								
4.	Compare the information to determine if the new entry and any of the potential duplicates is the same person.	Follow the steps below:								
	<table><tr><th>Determination</th><th>Action</th></tr><tr><td>a. A potential duplicate is the same person you are attempting to create.</td><td>Click on the KAMIS ID link of the existing record that is the same person. Their Person Administration page opens, and you can review and make any changes as necessary. The original record you started to create will be canceled automatically.</td></tr><tr><td>b. None of the potential duplicates is the same person as the one you are attempting to create.</td><td><ul style="list-style-type: none">Click on the Override Duplicate Entry check box. The box displays with a checkmark.Click on the Create New Client Entry button to finish creating the new person record you started with.</td></tr><tr><td>c. Not sure – need more information to make determination.</td><td>Click on the KAMIS ID link for the existing record that is potentially the same person. Their Person Administration page opens, and you can review this information (Address, etc.) to determine if this is indeed the same person.<ul style="list-style-type: none">If it is, update this record as needed and save any changes.If it is not, click on the Cancel button. The Person Search screen displays. Click on the Create New Name Entry button and re-enter the new person information.</td></tr></table>		Determination	Action	a. A potential duplicate is the same person you are attempting to create.	Click on the KAMIS ID link of the existing record that is the same person. Their Person Administration page opens, and you can review and make any changes as necessary. The original record you started to create will be canceled automatically.	b. None of the potential duplicates is the same person as the one you are attempting to create.	<ul style="list-style-type: none">Click on the Override Duplicate Entry check box. The box displays with a checkmark.Click on the Create New Client Entry button to finish creating the new person record you started with.	c. Not sure – need more information to make determination.	Click on the KAMIS ID link for the existing record that is potentially the same person. Their Person Administration page opens, and you can review this information (Address, etc.) to determine if this is indeed the same person. <ul style="list-style-type: none">If it is, update this record as needed and save any changes.If it is not, click on the Cancel button. The Person Search screen displays. Click on the Create New Name Entry button and re-enter the new person information.
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5.	1a, 1b, or 1c above is completed.	The person record is now created or updated, and additional regions are available for entry.								

Adding Person Roles

Introduction

Every person added to Person Administration has at least one role. This 'initial role' is required when creating a new person. It is possible for a person to have more than one role, depending on how their person record is used in KAMIS.

Person Roles

After a person record has been created, and an Initial Role assigned, it is possible to add additional roles to the person. Additional roles may be assigned depending on why the person is in the system. The ability to add multiple roles to a single person record re-emphasizes the rule that no person should be created more than once in the Person Administration application. Following are three examples of persons with multiple roles:

Example 1: John Doe is receiving services via the HCBS/FE waiver. Mr. Doe is also the husband of Jane Doe, who is also receiving services. Both John and Jane will have two roles – *Customer* (receiving services) and *Associate* (has a business or personal relationship with another person in the system).

Example 2: Mary Smith is the daughter of a customer entered in the system. Mary Smith is also a case manager for an unrelated customer receiving services via the HCBS/IDD waiver. Mary will have two roles – *Associate* (has a business or personal relationship with another person in the system) and *Case Manager* (case manager for another person in the system).

Example 3: Paul Person is a customer, receiving services via a variety of funding sources. His sister is also in the system, and he is listed on her account as her brother. Paul has applied for employment with one of the State Hospitals/Institutions. Paul will have three roles – *Customer* (receiving services), *Associate* (has a business or personal relationship with another person in the system), and *Employee* (so the State Hospital/Institution can do an employee background check.)

The most common roles used in KAMIS are *Customer*, *Associate*, *Case Manager*, and *Assessor*. The table below contains all the roles that can be assigned to a person record:

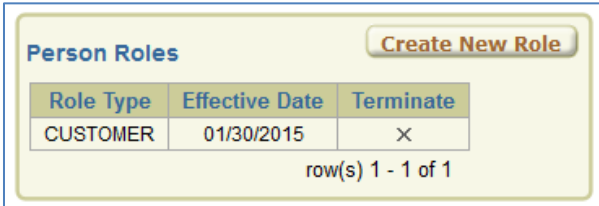
Available Roles	
Administrator	Employee
Applicant Employee	Employee Caregiver
Applicant Volunteer	Foster Grandparent
Assessor	Foster Parent
Associate	Intern
Care Recipient	Nurse
Caregiver	Options Counselor
Caregiver Grandparent	Social Worker
Case Manager	Student Nurse
Customer	Volunteer
Doctor	

Continued on next page

Adding Person Roles, continued

How to

Follow the steps in the table below to add an additional role to an existing person record.

Step	Action	Results
1.	From the Person Administration/ Home tab, locate the Person Roles region.	Any existing roles already assigned to the person record displays here.
		
2.	Click on the Create New Role button.	The Role Administration page will display.
3.	Select the Role to be added. Only one role can be selected at a time.	The radio button next to the role type is selected.

KAMIS ID: 200353721 Name: JETSON, JULIE Customer Status: ACTIVE [More Person Info...](#)
 Primary PSA NORTHWEST KANSAS AAA No Secondary PSAs

Role Administration

Select Role Type

- ☐ ADMINISTRATOR
- ☐ APPLICANT EMPLOYEE
- ☐ APPLICANT VOLUNTEER
- ☐ ASSESSOR
- ☒ ASSOCIATE
- ☐ CARE RECIPIENT
- ☐ CAREGIVER
- ☐ CAREGIVER GRANDPARENT
- ☐ CASE MANAGER
- ☐ DOCTOR
- ☐ EMPLOYEE
- ☐ EMPLOYEE CAREGIVER
- ☐ FOSTER GRANDPARENT
- ☐ FOSTER PARENT
- ☐ INTERN
- ☐ NURSE
- ☐ OPTIONS COUNSELOR
- ☐ SOCIAL WORKER
- ☐ STUDENT NURSE
- ☐ VOLUNTEER

Status ACTIVE
 Effective Date 03/19/2015

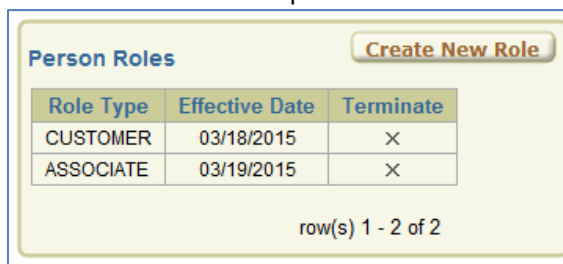
Create New Role Cancel

Continued on next page

Adding Person Roles, continued

How to (continued)

Step	Action	Results
4.	Click on the Create New Role button at the bottom of the Role Administration region.	The page will return to the Person Administration/Home tab, with a 'Roles Successfully saved' message at the top of the page. The Person Roles table now displays the initial and added role.

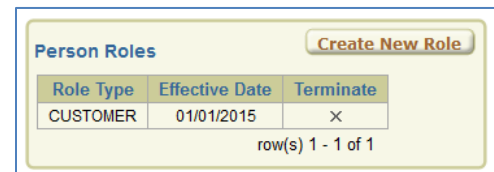
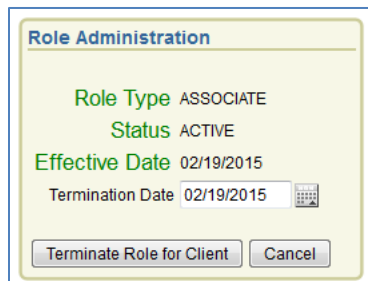


5. Repeat the above step to add any more roles.

Terminate a Role If a role is added erroneously, or is no longer needed, you can terminate a Person Role.

How to Follow the steps in the table below to terminate a Person Role.

Step	Action	Result
1.	In the Person Roles region, click on the "X" under the Terminate column next to the role to be terminated.	The Role Administration window for the person displays.
2.	Enter a Termination Date for the role to make the role inactive.	Type the date or use the date-picker to insert a date.
3.	Click on the Terminate Role for Client button	The role is removed from the Person Roles region on the Person Administration/Home page.



Changing a Customer's Status

Introduction

A customer's status within Person Administration is either Active, Inactive, or Deceased. The Active role is assigned automatically when a new customer is created, or when the Customer role is added to an existing person.

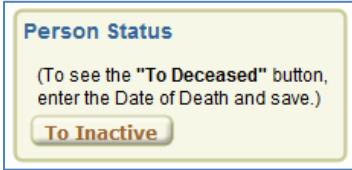
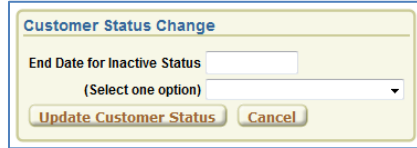
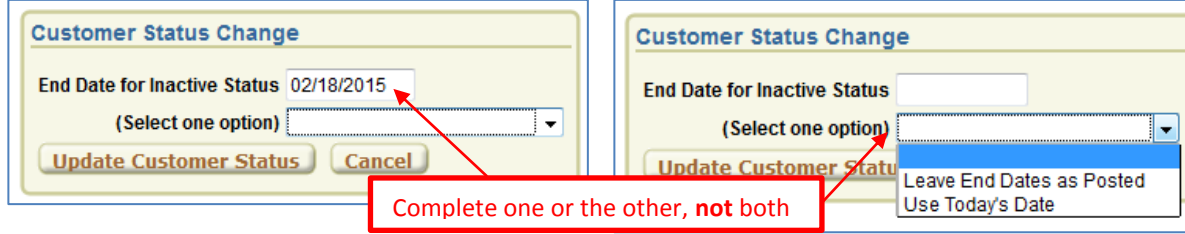
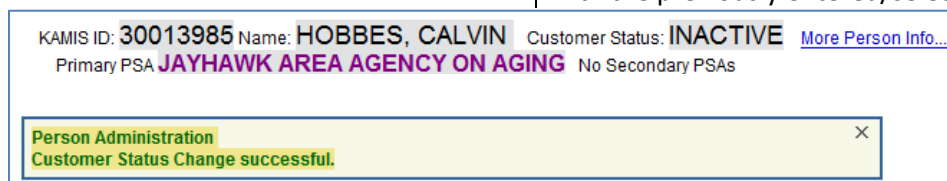
Role	Definition
Active	The customer is newly created or is an existing customer with a current assessment or other KAMIS form.
Inactive	The customer does not have a current assessment or intake with the Primary or Secondary organization, and is not receiving services.
Deceased	The customer has died.

Note 1: Only person records with the Customer role have a Person Status assigned.

Note 2: A customer must be in Active status for a new form to be created, or to update an existing one.

Inactivate a Customer

Follow the steps in the table below to change a customer's Person Status to Inactive.

Step	Action	Result
1.	In the Person Status region, click on the To Inactive button. 	The Customer Status Change page displays. 
2.	Either enter the end date for inactive status OR select one of the options from the drop-down list.	If you enter both a date and select one of the options, you will get an error. 
3.	Click on the Update Customer Status button.	The Person Admin/Home page displays with a message confirming the status change, and the Customer Status in the customer information header changes to INACTIVE. Any open service lines are closed with the previously entered/selected date. 

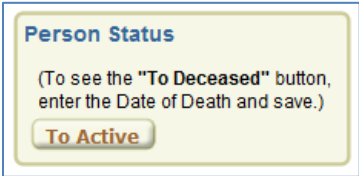
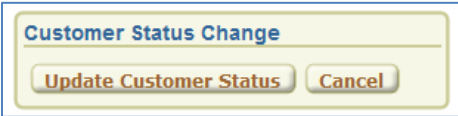
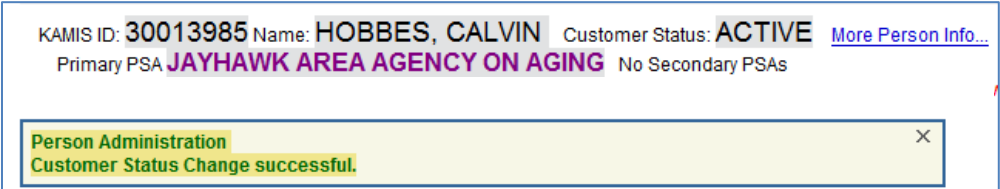
Continued on next page

Changing a Person's Status, continued

Activate a Customer

If a customer's Person Status is *Inactive*, you cannot create new forms for that customer until you change the status back to *Active*.

Follow the steps in the table below to change a customer's Person Status back to *Active*.

Step	Action	Result
1.	In the Person Status region, click on the To Active button. 	The Customer Status Change page displays. 
2.	Click on the Update Customer Status button. 	The Person Admin/Home page displays with a message confirming the status change, and the Customer Status in the customer information header is changed to ACTIVE.

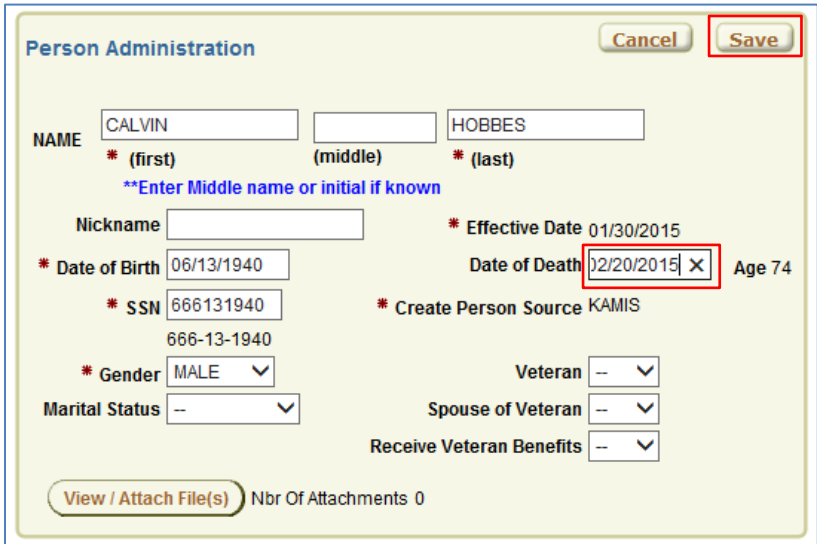
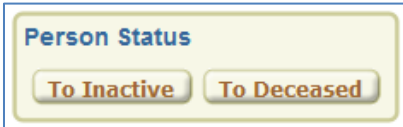
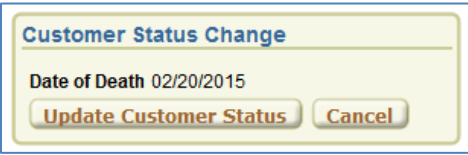
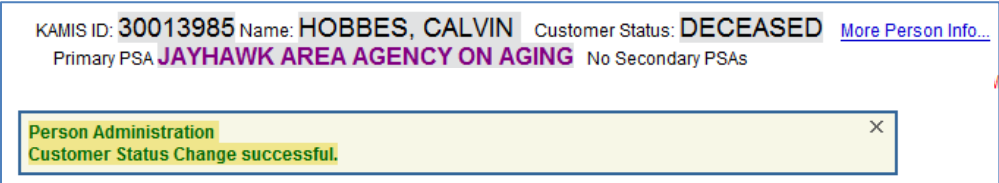
Continued on next page

Changing a Person's Status, continued

Decease a Customer

When a customer dies, you should change the Person Status to *Deceased*. Any open service lines on the customer's plan of care are closed automatically.

Follow the steps in the table below to change the Person Status to *Deceased*.

Step	Action	Result
1.	In the Person Administration region of the Person Admin/Home page, enter the Date of Death for the customer and click on the Save button.	The date of death is saved and the Person Status region is updated to include the 'To Deceased' button.
 		
2.	In the Person Status region, click on the To Deceased button.	The Customer Status Change page displays, showing the date of death.
		
3.	Click on the Update Customer Status button.	The Person Admin/Home page displays with a message confirming the status change, and the Customer Status in the customer information header is changed to DECEASED.
		

Alert

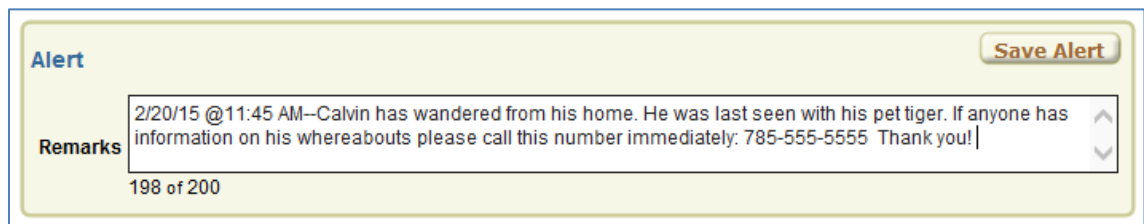
Introduction

The Alert is a tool used to convey an immediate informational notice regarding a person. Anyone that can view the person's Person Administration page or the Forms List can see the Alert. Any user that has access to edit the person's Person Administration page can delete or change the message, and no history is kept of previous Alerts. It is recommended that the customer Case Log be used for any permanent informational notes.

How To

Follow the steps in the table below to add an Alert message.

Step	Action	Results
1.	In the Alert Region, type the desired information that pertains to the person.	You can type up to 200 characters in the alert text area.
2.	Click on the Save Alert button.	The Alert is saved.
3.	Click on the Person Forms button in the navigation menu bar to view the Alert on the Customer Forms Listing page.	The Alert displays at the top of the Forms List in large red type:



KAMIS ID: 30013985 Name: HOBBS, CALVIN Customer Status: ACTIVE [More Person Info...](#)
Primary PSA JAYHAWK AREA AGENCY ON AGING No Secondary PSAs
EMDt passed to Header: 30-JAN-15 (ISD; as JOBAUER, PSA 4.) Note that MCOs are in PERSON_PSA, not -MCO; fix if/when MCOs pulled from _PSA.

Customer Forms Listing

Alert: 2/20/15 @11:45 AM--Calvin has wandered from his home. He was last seen with his pet tiger. If anyone has information on his whereabouts please call this number immediately: 785-555-5555 Thank you!

Create New Form

To Person Search

Form Type	Form Date	Form Status	Organization	Unmet Needs	Plan of Care or Service Authorization
STANDARD INTAKE - IN-HOME SERVICES	02/19/2015	WORK IN PROGRESS	4		

Add Address Information

Introduction

Most forms in KAMIS require a customer to have a residential address in order to save the form in Approved status. Some forms require certain types of associates to have a business or residential address in order for the name to appear in some drop-down lists, or for a form to be saved in Approved status.

Address Types


A person may have several different types of addresses.

Available Address Types	
Alternative	Mailing
Billing	Residential *Required for All Customers*
Business	Shipping

Two additional address types may appear in the Address Information region within Person Administration – 'Conversion Address' and 'MMIS/KMAP Address.' These address types are read-only and are only added or updated by automated processes in KAMIS.

How To

Follow the steps in the table below to add an address to a person record.

Step	Action	Results
1.	If this is the first address added for this customer, the Address Information region will display a 'no data found' message.	
2.	Click on the Add New Address button.	The Address data entry page displays. Note: All fields marked with an asterisk (*) are required.

Address changes will generate an address history record, with the new copy effective today.

Address Administration
Name
* Address Type
* Effective Date 02/20/2015
* Street
* City
* County (abbr)
* State (abbr)
* Zip
Primary Phone Alternate Phone
Cell Phone Fax Phone
Email
Website
Directions
0 of 2000

Address History
no data found

Continued on next page

Add Address Information, continued

How To

Continued

Step	Action	Results
3.	Select the desired Address Type from the drop-down list.	A Residential address is required for all assessment forms.
4.	Enter Address Effective Date .	Defaults to the current date.
5.	Enter a complete address. You must enter something in the Street, City, County, State and Zip code fields.	Enter as complete information as possible, including a phone number if you have it.
	<ul style="list-style-type: none"> If you do not have an address for the person, (as may be the case with an emergency contact that you only have a phone number for) you can enter 'Unknown' for the Street and City if you do not know either. If you do not know the County, State, or Zip Code, you can use the information from the customer associated with this person. If the person is homeless, you can enter 'Homeless' as the Street address. The City, State, County, and Zip code can be entered as you see fit, but something must be entered. For example, you can use your agency's city, county, etc. If the address is out of state, enter ZZ for the county. If the address is outside of the United States, use ZZ for the State. 	
6.	Click on the Save button.	Person Admin/Home page displays with the new address displayed in the Address Information table.

Address Information

Add New Address

View/Modify	Address	City	County Name	Primary Phone	Type	Effective Date	Termination Date
	12345 NE ROSALND ST	TOPEKA	SHAWNEE	7855551234	RESIDENTIAL	02/20/2015	

row(s) 1 - 1 of 1

Update Address Information

Introduction

If a person's address information changes, it will be necessary to update the information in Person Administration. It may just be fixing an error in an existing address, or changing it completely. The original address is terminated, and the updated/new address is created as a new address record. As long as the person's Effective Date does not change, the address history will be available.

If something is changed in the demographic information that causes the person's Effective Date to be updated, only the current addresses will roll over with the new Effective Date, and any future changes that occur with the new Effective Date will be available.

Important

Due to the history collection features of Person Administration that are used in some state and federal reporting, an address can only be updated once within a 24-hour period. If you try to edit an existing address record within that 24-hour period, you will see a notice at the top of the Address Administration (update) page and the address information displays as read only:

ADDRESS NOT EDITABLE: ALREADY COPIED ONCE TODAY.

Address Administration

Name HOBBS, CALVIN

Termination Date (mm/dd/yyyy)

* Address Type RESIDENTIAL

* Effective Date 02/20/2015

* Street 12345 NE ROSALND ST

* City TOPEKA

County SN - SHAWNEE

State KS - KANSAS * Zip 66603-

Primary Phone 7855551234 Alternate Phone

Cell Phone Fax Phone

Email

Website

Directions

How To

Follow the steps in the table below to update an existing address.

Step	Action	Result
1.	In the Address Information region, click on the View/Modify icon next to the address to be updated.	The Address Administration page displays with all fields available except the Effective Date. The Effective Date is automatically populated with the current date.

Address Information

View/Modify	Address	City	County Name	Primary Phone	Type	Effective Date	Termination Date
	9999 SW 999TH ST	TOPEKA	SHAWNEE	7855551234	RESIDENTIAL	07/11/2014	

row(s) 1 - 1 of 1

Continued on next page

Update Address Information, continued

How to

continued

Step	Action	Result
1.	continued	<p>Address changes will generate an address history record, with the new copy effective today.</p> <div> <p>Address Administration</p> <p>Name KACEY-PEESY, MARY</p> <p>Termination Date (mm/dd/yyyy) <input type="text"/></p> <p>* Address Type RESIDENTIAL ▼</p> <p>* Effective Date 07/11/2014</p> <p>* Street 9999 SW 999TH ST</p> <p>* City TOPEKA</p> <p>County SN - SHAWNEE ▼</p> <p>State KS - KANSAS ▼ * Zip 66666 - <input type="text"/></p> <p>Primary Phone 7855551234 Alternate Phone <input type="text"/></p> <p>Cell Phone 7855551234 Fax Phone <input type="text"/></p> <p>Email <input type="text"/></p> <p>Website <input type="text"/></p> <p>Directions <input type="text"/></p> <p>0 of 2000</p> <p>Save Cancel</p> <p>Address History</p> <p>no data found</p> </div>
2.	Update the address as needed.	
3.	Click on the Save button.	The old address is terminated automatically, and a new address record is created with the updated information. The Person Admin/Home page displays and the Address Information region reflects the changes made.
4.	Review the Address Information region.	The Address Information table shows the old address with the current date as the Termination Date. The new address displays with the current date as the Effective Date, with no termination date, indicating it is the current address.

Address Information [Add New Address](#)

View/Modify	Address	City	County Name	Primary Phone	Type	Effective Date	Termination Date
	2468 SW 85TH ST	TOPEKA	SHAWNEE	7855551234	RESIDENTIAL	02/20/2015	
	9999 SW 999TH ST	TOPEKA	SHAWNEE	7855551234	RESIDENTIAL	07/11/2014	02/20/2015

row(s) 1 - 2 of 2

Person Aliases

Introduction

The Person Aliases region was added to Person Administration for use by other KDADS web applications that require this level of person record detail. It can be used in KAMIS, although KAMIS does not use the information anywhere else, and does not access the information for any searches it does. The information would be available for reference purposes only.

An alias entry consists of a single timeframe for which the alias was used (if known) and the specific alias for that timeframe. If the person is known by several names (maiden name, married name, second married name, etc.) separate entries must be entered for each name.

How To

Follow the steps in the table below to enter a person alias.

Step	Action	Result
1.	Click on the Add New Alias button in the Person Aliases region.	The Person Alias entry page displays.
<div><div>KAMIS ID: 200353721 Name: JETSON, JULIE Customer Status: ACTIVE More Person Info... Primary PSA NORTHWEST KANSAS AAA No Secondary PSAs</div><div><div>PERSON ALIAS</div><div>Cancel Create</div><div>Only enter the information in the field that is different. If the maiden name is known, create a separate record for the maiden name. If the date of birth or SSN is different, create a separate record for each difference.</div><div>Name: First <input type="text"/> Middle <input type="text"/> Last <input type="text"/> Maiden Name <input type="text"/> SSN (no dashes) <input type="text"/> Birth Date <input type="text"/> Used From Date <input type="text"/> Used To Date <input type="text"/></div></div></div>		
2.	Enter only the alias information known for the specific timeframe you are entering. If the timeframe is unknown, and you do not know if any of the aliases overlap, enter each one separately.	Examples: If only the first name is different, just enter the first name. If only the Birth Date is different, with no name change, enter just the Birth Date.
<div><div>KAMIS ID: 200353721 Name: JETSON, JULIE Customer Status: ACTIVE More Person Info... Primary PSA NORTHWEST KANSAS AAA No Secondary PSAs</div><div><div>PERSON ALIAS</div><div>Cancel Create</div><div>Only enter the information in the field that is different. If the maiden name is known, create a separate record for the maiden name. If the date of birth or SSN is different, create a separate record for each difference.</div><div>Name: First <input type="text" value="JULIA"/> Middle <input type="text"/> Last <input type="text" value="JETSONNE"/> Maiden Name <input type="text"/> SSN (no dashes) <input type="text"/> Birth Date <input type="text"/> Used From Date <input type="text"/> Used To Date <input type="text"/></div></div></div>		




Continued on next page

Person Aliases, continued

How to

continued

Step	Action	Result
3.	Click on the Create button.	The Person Admin/Home page displays with the added alias entries in the Person Aliases table.

Person Aliases							Add New Alias
Edit ▲	Name	Maiden Name	Birth Date	From Date	To Date	Ssn	
	JULIA	-	-	-	-	--	
		-	03/27/1975	-	-	--	
	JULIA JETSONNE	-	-	-	-	--	
							1 - 3

Completed Person Admin/Home Page

KAMIS ID: 200353721 Name: JETSON, JULIE Customer Status: ACTIVE [More Person Info...](#)
Primary PSA: **NORTHWEST KANSAS AAA** No Secondary PSAs

[Person Search](#) [Person Admin](#)
[Home](#) [Associates and Affiliations](#)

Person Administration [Cancel](#) [Save](#)

NAME: JULIE (first) (middle) JETSON (last)
**Enter Middle name or initial if known
Nickname: Effective Date: 03/18/2015
* Date of Birth: 03/27/1971 Date of Death: Age 43
* SSN: 333711927 * Create Person Source: KAMIS
333-71-1927
* Gender: FEMALE Veteran: --
Marital Status: SINGLE Spouse of Veteran: --
Receive Veteran Benefits: --
[View / Attach File\(s\)](#) Nbr Of Attachments:

Ethnicity / Language

* Race: REPORTING 2 OR MORE RACES
Ethnicity: NOT HISPANIC OR LATINO
Ethnicity Remarks:
0 of 200
Speaks: ENGLISH Reads: ENGLISH Understands Only: ENGLISH
Interpreter Needed: ☒ No ☐ Yes

Person Aliases [Add New Alias](#)

Edit	Name	Maiden Name	Birth Date	From Date	To Date	Ssn
	JULIA	-	-	-	-	--
	-	-	03/27/1975	-	-	--
	JULIA JETSONNE	-	-	-	-	--

1 - 3

Alert [Save Alert](#)

Remarks:
0 of 200

Address Information [Add New Address](#)

View/Modify	Address	City	County Name	Primary Phone	Type	Effective Date	Termination Date
	3277 NW 52ND ST	WICHITA	SEDGWICK	3185553277	RESIDENTIAL	03/19/2015	

row(s) 1 - 1 of 1

HCBS Waiver Eligibility Information

No HCBS Waiver Eligibility data found
Medicaid ID Number:
[Add To Waiting List](#)

HCBS Wait List Info

no data found

Person Status

(To see the "To Deceased" button, enter the Date of Death and save.)
[To Inactive](#)

Person Roles [Create New Role](#)

Role Type	Effective Date	Terminate
CUSTOMER	03/18/2015	X
ASSOCIATE	03/19/2015	X

row(s) 1 - 2 of 2

Associates and Affiliations – Overview

Introduction

An Associate in KAMIS is a person that has a personal or business relationship with another person, usually a customer, in KAMIS. Spouses, parents, case managers, and assessors are all examples of associates.

The Associates and Affiliations secondary tab of Person Admin is used to search for and add associates to a customer record. A **Listing of Associates** table displays a variety of information about each person added as an associate to the customer.

The associate must already exist in KAMIS before he/she can be added to a customer's Associates and Affiliations page. A search is performed to find the existing person record for the associate; they are then added to the Listing of Associates table of the customer.

Note: The Person Search feature in KAMIS only searches for Customer records. Only associates that are also customers will be found there.

The following instructions will deal exclusively with the Associates feature of this page.

Person Admin/ Associates and Affiliations page

A customer's Person Admin/Associates and Affiliations page, and the Associate's Person Information page, comprise the functional pages of an Associate record. Because KAMIS procedure requires looking up a person before creating the person record to avoid duplicate entries, an Associate search function is included on the Associates and Affiliations page.

Associates and Affiliations page:

KAMIS ID: 200353717 Name: JETSON, JAMEY Customer Status: ACTIVE [More Person Info...](#)
Primary PSA NORTHWEST KANSAS AAA No Secondary PSAs

Person Search

Person Admin

Home

Associates and Affiliations

List Associates

Modify	First	Middle	Last	Relationship	Associate Type	Effective Date	Term Date
	JED	J	JETSON	BROTHER	EMERGENCY CONTACT	02/01/2015	-

1 - 1

First Name Last Name

Search Reset

Created by TRAINING02 on 02/03/2015. Last modified by TRAINING02 on 03/18/2015.

Customer Roles at Organizations

No Entity Roles found.

KDHE WORK Program Information

no data found

Share-Transfer History

No Shares or Transfers found

Continued on next page

Associates and Affiliations – Overview, continued

Relationship Types

When adding an associate to a customer record, the associate's relationship to the customer must be provided. The Relationship Types to choose from are:

Relationship Type	
(DPOA) Durable Power of Attorney	Husband
(DPOAHCD) Durable Power of Attorney for Health Care Decisions	Landlord
Aunt	Mother
Brother	Mother-in-law
Case Manager	Neighbor
Clergy	Nephew
Conservator	Niece
Cousin	Non-Married Partners
Daughter	Non-Relative
Daughter-in-law	Other
Elderly Non-Relative	Other Relative
Elderly Relative	Relationship Missing
Employee	Self
Father	Significant Other
Father-in-law	Sister
Foster Parent	Son
Friend	Son-in-law
Granddaughter	Spouse
Grandparent(s)	Stepfather
Grandson	Stepmother
Guardian	Uncle
Housing Manager	Wife

Associate Types

In addition to assigning a relationship between a customer and an associate, an associate type must also be assigned. The Associate Types to choose from are:

Associate Types	
(DPOA) Durable Power of Attorney	Financially Responsible
(DPOA) Durable Power of Attorney for Health Care Decisions	Friend / Acquaintance
Caller / Referred By	Legal Guardian
Care Recipient	Present at Assessment
Emergency Contact	Primary Caregiver
Family Member	Primary Contact
Financial Contact	Responsible Party

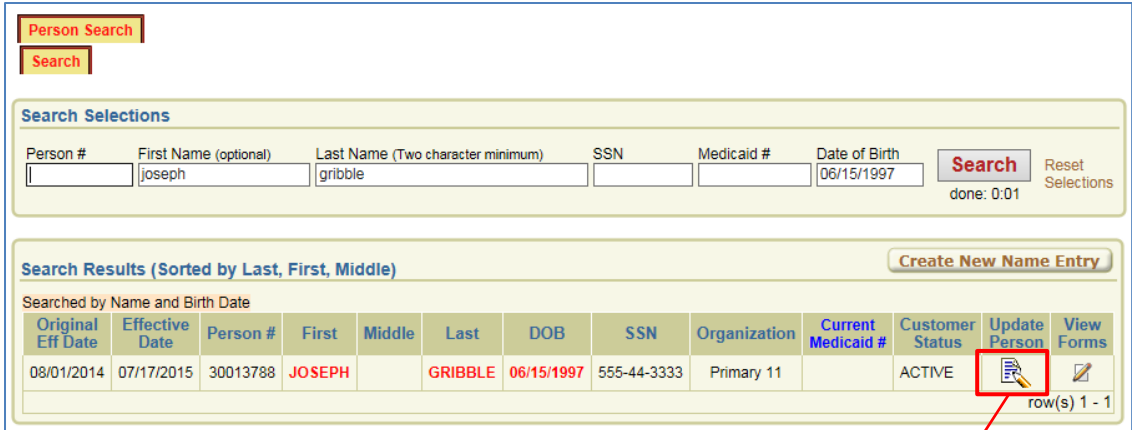

Search for an Associate

Introduction

The first step in adding an associate to a customer is to use the Associate Search fields to determine if the associate exists in KAMIS. An associate cannot be added to the Associates and Affiliations page unless his/her person record already exists.

How to

Follow the steps in the table below to search for an associate prior to adding him/her to a customer's Listing of Associates.

Step	Action	Result
1.	Perform a Person Search for the customer that the associates are being added to.	The Person Search Results displays the customer's name and other demographic information.
2.	Click on the Update Person icon to open the customer's Person Admin page.	The customer's Person Admin/Home page displays.
		
		
3.	Click on the Associations and Affiliations secondary tab.	The customer's Associations and Affiliations page displays.

Continued on next page

Search for an Associate, continued

How to

continued

Step	Action	Result																				
	<div><div>KAMIS ID: 30013788 Name: GRIBBLE, JOSEPH Customer Status: ACTIVE More Person Info...</div><div>Primary PSA JOHNSON CO AAA No Secondary PSAs</div><div><div>Person Search Person Admin</div><div>Home Associates and Affiliations</div></div><div><div>Listing of Associates</div><div>no data found</div><div><div>First Name</div><div>Last Name</div><div>Search</div><div>Reset</div></div></div></div> <div>Note: This customer has no associates added yet.</div>																					
4.	Locate the Search fields at the bottom of the Listing of Associates region.																					
5.	Enter the First Name of the associate to be added.	Optional field. Minimum one character if used.																				
6.	Enter the Last Name of the associate to be added.	This field is required, and at least the first two characters of the last name must be entered.																				
7.	Click on the Search button.	KAMIS searches for any person records matching the entry.																				
8.	The Associate Search Results will return either matching names or a 'no data found' message.	Search Results matches all types of person records (Customer, Assessor, etc.), not just Associate.																				
	<div><div><div>Person Search Person Admin</div><div>Home Associates and Affiliations</div></div><div><div>Listing of Associates</div><div>no data found</div><div><div>First Name</div><div>N</div><div>Last Name</div><div>GRIBBLE</div><div>Search</div><div>Reset</div></div></div><div><div>Associate Search Results</div><div>Create New Person as Associate</div><table><thead><tr><th>Add Associate</th><th>KAMIS ID</th><th>Person Effective Date</th><th>First</th><th>Middle</th><th>Last</th><th>Address Type</th><th>Address</th><th>City</th><th>Phone</th></tr></thead><tbody><tr><td>Add</td><td>30013789</td><td>11/07/2014</td><td>NANCY</td><td>-</td><td>GRIBBLE</td><td>RESIDENTIAL</td><td>12345 SW 10TH ST</td><td>TOPEKA</td><td>-</td></tr></tbody></table><div>1 - 1</div></div></div>	Add Associate	KAMIS ID	Person Effective Date	First	Middle	Last	Address Type	Address	City	Phone	Add	30013789	11/07/2014	NANCY	-	GRIBBLE	RESIDENTIAL	12345 SW 10TH ST	TOPEKA	-	Matches Found
Add Associate	KAMIS ID	Person Effective Date	First	Middle	Last	Address Type	Address	City	Phone													
Add	30013789	11/07/2014	NANCY	-	GRIBBLE	RESIDENTIAL	12345 SW 10TH ST	TOPEKA	-													
	<div><div><div>Person Search Person Admin</div><div>Home Associates and Affiliations</div></div><div><div>Listing of Associates</div><div>no data found</div><div><div>First Name</div><div>x</div><div>Last Name</div><div>gribble</div><div>Search</div><div>Reset</div></div></div><div><div>Associate Search Results</div><div>Create New Person as Associate</div><div>no data found</div></div></div>	No matches																				

Add an Associate (Existing Person) to a Customer Record

Add Associate – Existing Person Record

The steps for adding an associate differ depending on what Associate Search Results display. If the associate already exists in KAMIS, the record can simply be added to the customer's Listing of Associates.

How to

Follow the steps in the table below to add an existing person in KAMIS as an associate.

Step	Action	Result
1.	Locate the person to be added as an associate from the Associate Search Results list.	
2.	Click on the Add link at the beginning of the row.	The Add Associate page displays. The existing person record information displays.

Person Search | Person Admin
Home | Associates and Affiliations

Listing of Associates
no data found
First Name Last Name

Associate Search Results

Add Associate	KAMIS ID	Person Effective Date	First	Middle	Last	Address Type	Address	City	Phone
Add	30013789	11/07/2014	NANCY	-	GRIBBLE	RESIDENTIAL	12345 SW 10TH ST	TOPEKA	-

1 - 1

KAMIS ID: 30013789 NANCY GRIBBLE, JOSEPH Customer Status: ACTIVE More Person Info...
Primary PSA: JOHNSON, DAAA No Secondary PSAs

Person Information

Person Nbr: 30013789
NAME:
 (first) (middle - optional) (last)
 * Person Effective Date: 11/07/2014
 * Person Initial Role: ASSOCIATE
 Gender: Age: 41
 Associate Person Term Date:

Roles

* Role Effective Date:
 * Relationship:
 * Associate Type:

Person Associate Roles
no data found

Added by TRAININGUSER on 11/07/2014 16:43:15 Changed by TRAININGUSER on 11/07/2014 16:42:42
 * Indicates Required

Address Information List

View/Modify	Type	Address	City	County Name	Primary Phone	Alternate Phone	Cell Phone	E-Mail Address	Effective Date	Termination Date
<input type="checkbox"/>	RESIDENTIAL	12345 SW 10TH ST	TOPEKA	SHAWNEE	-	-	-	-	02/26/2015	-

row(s) 1 - 1 of 1

Address Information

Please Note: Enter address information if known.
 Enter Unknown if you do not know the street address.

* Address Type:
 * Effective Date:
 * Street:
 City:
 County:
 State:
 Zip:
 Primary Phone: Alternate Phone:
 Cell Phone:
 Email:

Continued on next page

Add an Associate (Existing Person) to a Customer Record, continued

How to

continued

Step	Action	Result
3.	In the 'Roles' region, enter the Effective Date of this person's association to the customer.	The Effective Date cannot be before the associate's Person Effective Date.
4.	From the Relationship drop-down list, select this person's relationship to the customer.	The selection displays.
5.	From the Associate Type drop-down list, select this person's type of association to the customer.	The selection displays.
6.	Click on the Save Assoc Roles button.	The new association is saved and the Person Associate Roles region displays the new association information for this associate.

Person Information

Save Person Information

Person Nbr: 30013789

NAME: NANCY GRIBBLE

* (first) (middle - optional) * (last)

* Person Effective Date: 11/07/2014

* Person Initial Role: ASSOCIATE

* Create Person Source: KAMIS Age: 41

Gender: FEMALE

Associate Person Term Date:

Roles

Save Assoc Roles

* Role Effective Date: 03/01/2015

* Relationship: MOTHER

* Associate Type: EMERGENCY CONTACT

Person Associate Roles

no data found

Person Associate Roles

View/Term ▲	Associate Type	Relationship	Term Date
✎	EMERGENCY CONTACT	MOTHER	-

1 - 1

Continued on next page

Add an Associate (Existing Person) to a Customer Record, continued

How to

continued

Step	Action	Result
7.	Click on the Return button.	The customer's Person Admin/Associates and Affiliations page displays, and the Listing of Associates table is updated with the new associate information.

Return

Person Information

Save Person Information

Person Nbr: 30013789

NAME: NANCY GRIBBLE

(first) (middle - optional) (last)

* Person Effective Date: 11/07/2014

* Person Initial Role: ASSOCIATE * Create Person Source: KAMIS Age: 41

Gender: FEMALE

Associate Person Term Date:

Roles

Save Assoc Roles

* Role Effective Date

* Relationship ~select~

* Associate Type ~select~

Person Associate Roles

View/Term	Associate Type	Relationship	Term Date
	EMERGENCY CONTACT	MOTHER	-

1 - 1

KAMIS ID: 30013788 Name: GRIBBLE, JOSEPH Customer Status: ACTIVE [More Person Info...](#)

Primary PSA JOHNSON CO AAA No Secondary PSAs

Person Search Person Admin

Home Associates and Affiliations

Listing of Associates

First	Middle	Last	Relationship	Associate Type	Associate Effective Date	Term Date	KAMIS ID Click to Edit Assoc. Person Info.
NANCY	-	GRIBBLE	MOTHER	EMERGENCY CONTACT	03/01/2015	-	30013789

1 - 1

First Name Last Name Search Reset

Note: Editing the associate's address information is covered later in the Associate section of this chapter.

Add an Associate (New Person) to a Customer Record

Add Associate – Create New Person

If an Associate Search results in no data found, a new person record must be created for the associate. Then the associate can be added to a customer's Listing of Associates.

How to

After doing an Associate Search and getting a 'no data found' result, follow the steps in the tables below to create a new person record with an Associate role, and then add him/her to a customer's Listing of Associates.

Step	Action	Result
1.	In the Associate Search Results region, click the Create New Person as Associate button.	The Person Admin page for a new associate displays.

KAMIS ID: 30013788 Name: GRIBBLE, JOSEPH Customer Status: ACTIVE [More Person Info...](#)
Primary PSA JOHNSON CO AAA No Secondary PSAs

[Person Search](#) [Person Admin](#)
[Home](#) [Associates and Affiliations](#)

Listing of Associates

First	Middle	Last	Relationship	Associate Type	Associate Effective Date	Term Date	KAMIS ID Click to Edit Assoc. Person Info.
NANCY	-	GRIBBLE	MOTHER	EMERGENCY CONTACT	03/01/2015	-	30013789

1 - 1

First Name Last Name

Associate Search Results

no data found

Person Information Associate

Person Nbr: _____

NAME:

▪ (first) (middle - optional) ▪ (last)

▪ Person Effective Date: 08/20/2015 ▪ Create Person Source: KAMIS Age: _____

Gender: -- ▾

Associate Person Term Date: _____

Associate Roles

▪ Role Effective Date:

▪ Relationship: ~select~ ▾

▪ Associate Type: ~select~ ▾

Person Associate Roles

no data found

Added by _____ on _____

▪ Indicates Required

Address Information Associate

Please Note: Enter address information if known.
Enter Unknown if you do not know the street address.

▪ Address Type: ~ Select ~ ▾

▪ Effective Date:

▪ Street:

City:

County:

State:

Zip: -

Primary Phone: Alternate Phone:

Cell Phone:

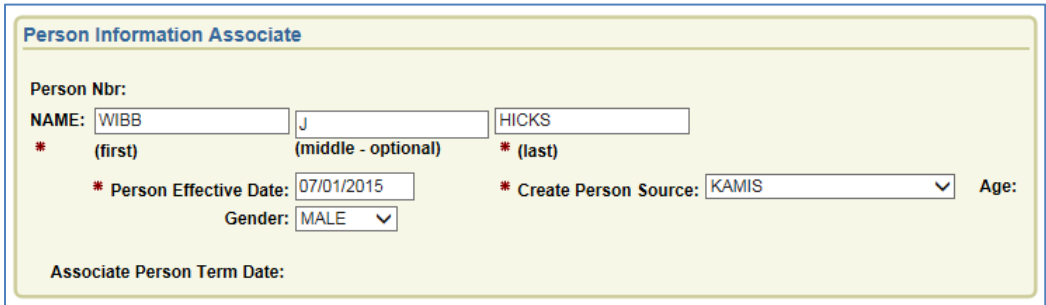
Email:

Continued on next page

Add an Associate (New Person) to a Customer Record, continued

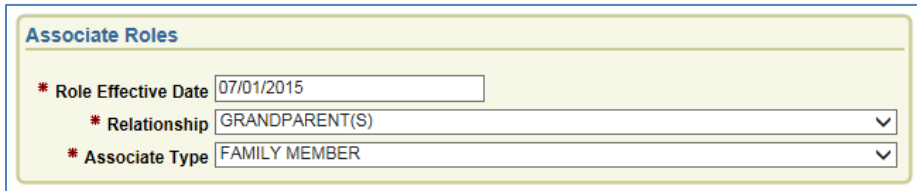
How to - Person Information Associate region

The Person Information Associate region is an abbreviated version of the original Person Admin/Home page.

Step	Action	Result
1.	Enter the associate's First and Last name. (Middle initial/name is optional)	Required.
2.	Enter the Person Effective Date .	Required.
3.	Accept the default Create Person Source selection of KAMIS .	Required.
4.	Enter the associate's Gender if known.	Optional.
 <p>The screenshot shows the 'Person Information Associate' form. It has a title bar 'Person Information Associate'. Below it, there's a 'Person Nbr:' label. The 'NAME' field is split into three parts: 'WIBB' (first), 'J' (middle - optional), and 'HICKS' (last). There are asterisks next to the first, middle, and last name fields. Below the name fields, there's a 'Person Effective Date' field with the value '07/01/2015', a 'Create Person Source' dropdown menu with 'KAMIS' selected, and an 'Age' field. Below these, there's a 'Gender' dropdown menu with 'MALE' selected. At the bottom, there's an 'Associate Person Term Date' field.</p>		
5.	Continue entry in the Associate Roles region.	See next table.

How to - Associate Roles region

The Associate Roles region assigns the Associate role to this person record, and identifies the specific association this person has to the customer. All fields in this region are required.

Step	Action	Result
6.	In the Role Effective Date field, enter the effective date for the Associate role.	Enter the date in MM/DD/YYYY format.
7.	Select the relationship of this person to the customer from the Relationship drop-down list.	The associate's relationship to the customer displays.
8.	Select the type of associate this person is to the customer from the Associate Type drop-down list.	The type of associate this person is to the customer displays.
 <p>The screenshot shows the 'Associate Roles' form. It has a title bar 'Associate Roles'. Below it, there's a 'Role Effective Date' field with the value '07/01/2015'. Below that, there's a 'Relationship' dropdown menu with 'GRANDPARENT(S)' selected. Below that, there's an 'Associate Type' dropdown menu with 'FAMILY MEMBER' selected.</p>		
9.	Continue entry in the Address Information Associate region.	See next table.

Continued on next page

Add an Associate (New Person) to a Customer Record, continued

How to - Address Information Associate region

Entering address information for an associate is not required. However, it is recommended that any known address information be entered.

If an address record is created, it must contain the Address Type, Effective Date, and Street. If the record is being created to enter just a phone number and/or email address, the Street field must still be completed, entering 'UNKNOWN' or a similar comment as necessary.

While there are three address types available in the Address Type drop-down list, only two can be used to create a new address: Residential, and Business. The MMIS/KMAP Address type is only used for new or updated addresses that come from the overnight feed from KMAP's client eligibility information, and is read only. If the MMIS/KMAP Address is selected as the address type, the address will return an error message and will not save.

If there is no address information to enter, skip to step 21 of these instructions.

Step	Action	Result
10.	In the 'Address Information Associate' region, select the Address Type from the drop-down list.	Required field. Do NOT choose MMIS/KMAP Address as the Address Type.
11.	Enter the address Effective Date .	Required field. Enter in MM/DD/YYYY format.
12.	Enter a Street address, if known. If the street address is not known, enter 'UNKNOWN' or a similar indicator.	Required field.
13.	Enter the City .	Optional.
14.	Enter the County code. Note: If the address is not in Kansas, enter ZZ for the County.	Optional. When the first letter of the county is entered, a list of all counties in Kansas starting with that letter appears. Type the second letter of the county to narrow the list to a single entry. Tab to or click in the next field to continue.
15.	Enter the State abbreviation. Note: If the address is not in the United States, enter ZZ for the State.	Optional.
16.	Enter the Zip code.	Optional.
17.	Enter the Primary Phone number.	Optional. Enter digits only – no special characters.
18.	Enter an Alternate Phone number.	Optional. Enter digits only – no special characters.
19.	Enter a Cell Phone number.	Optional. Enter digits only – no special characters.
20.	Enter an Email address.	Optional.

Continued on next page

Add an Associate (New Person) to a Customer Record, continued

How to - Address *continued*
Information
Associate region

Step	Action	Result
21.	Click on the Save button at the top of the page.	The new Associate record is saved, and the address displays in the Address Information List located above the address entry region. The Person Associate Roles region displays this person's relationship to the customer.

The screenshot shows the 'Person Information Associate' form with the 'Save' button highlighted in red. The form includes fields for Name (WIBB J HICKS), Person Effective Date (07/01/2015), Gender (MALE), and Create Person Source (KAMIS). The 'Associate Roles' section shows Role Effective Date (07/01/2015), Relationship (GRANDPARENT(S)), and Associate Type (FAMILY MEMBER). The 'Address Information Associate' section shows Address Type (RESIDENTIAL), Effective Date (07/01/2015), Street (UNKNOWN), City (ALBUQUERQUE), County (ZZ - OUT OF STATE COUNTY), State (NM - NEW MEXICO), Zip, Primary Phone (5551234567), and Alternate Phone. The 'Person Associate Roles' section shows 'no data found'.

See the saved record below.

Once a new Associate record has been saved, the page updates to include these new items:

- **Person Number** (KAMIS ID) is assigned to the new Associate record
- **Save Person Information** button located in the 'Person Information Associate' region
- **Save Address** button located in the 'Address Information Associate' region
- **Address Information List** region - includes any address additions, changes, and/or terminations entered, or a 'no data found' message in place of the table if there are no address entries.

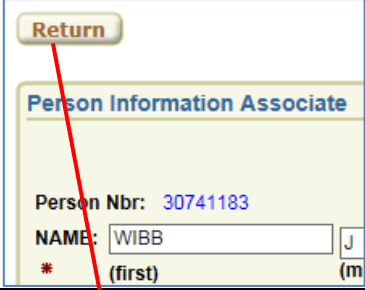
The screenshot shows the updated Associate record form. The 'Person Information Associate' region now includes a 'Save Person Information' button highlighted in red. The 'Address Information List' region is highlighted in red and shows a table with one row: RESIDENTIAL, UNKNOWN, ALBUQUERQUE, OUT OF STATE COUNTY, 555-123-4567, --, --, --, 07/01/2015, --. The 'Address Information Associate' region now includes a 'Save Address' button highlighted in red. The 'Person Associate Roles' section shows a table with one row: FAMILY MEMBER, GRANDPARENT(S), --.

Each region can now be individually saved if any additional changes need to be made.

Continued on next page

Add an Associate (New Person) to a Customer Record, continued

Return to Associates and Affiliations

Step	Action	Result
1.	<p>Click on the Return button located at the top of the Associate Information page.</p> 	<p>The customer's Associates and Affiliations page displays.</p> <p>The newly created Associate record is added to the Listing of Associates table.</p>

KAMIS ID: 30013788 Name: GRIBBLE, JOSEPH Customer Status: ACTIVE [More Person Info...](#)
 Primary PSA JOHNSON CO AAA No Secondary PSAs

[Person Search](#) [Person Admin](#)
[Home](#) [Associates and Affiliations](#)

Listing of Associates

First	Middle	Last	Relationship	Associate Type	Associate Effective Date	Term Date	KAMIS ID Click to Edit Assoc. Person Info.
NANCY	-	GRIBBLE	MOTHER	EMERGENCY CONTACT	03/01/2015	-	30013789
WIBB	J	HICKS	GRANDPARENT(S)	FAMILY MEMBER	07/01/2015	-	30741183

1 - 2

First Name Last Name [Search](#) [Reset](#)

Edit Associate Person Admin Information

Introduction

If an associate's Person Administration information needs to be updated, it must be done via the Person Admin/Associates and Affiliations tab of the customer the person is associated with. A link is provided in the Listing of Associates table to edit the associate's Person Administration record. The associate's name and gender can be changed, his/her address can be updated, and associations/relationships can be terminated.

Edit the Person Information Associate region

Follow the steps in the table below to edit an Associate's Person Information.

Step	Action	Result
1.	Locate the Associate record in the Listing of Associates.	
2.	Click on the person number link located in the KAMIS ID column.	The associate's Person Information page displays.

KAMIS ID: **30013788** Name: **GRIBBLE, JOSEPH** Customer Status: **ACTIVE** [More Person Info...](#)
Primary PSA **JOHNSON CO AAA** No Secondary PSAs

[Person Search](#) [Person Admin](#)
[Home](#) [Associates and Affiliations](#)

Listing of Associates

First	Middle	Last	Relationship	Associate Type	Associate Effective Date	Term Date	KAMIS ID Click to Edit Assoc. Person Info.
NANCY	-	GRIBBLE	MOTHER	EMERGENCY CONTACT	03/01/2015	-	30013789
WIBB	J	HICKS	GRANDPARENT(S)	FAMILY MEMBER	07/01/2015	-	30741183

First Name Last Name [Search](#) [Reset](#) 1 - 2

[Return](#)

Person Information Associate [Save Person Information](#)

Person Nbr: **30741183**

NAME:
(first) (middle - optional) (last)

Person Effective Date: 07/01/2015
Person Initial Role: ASSOCIATE
Gender: **MALE** Create Person Source: KAMIS Age:

Associate Person Term Date:

Associate Roles [Save Term Date](#)

Termination Date (mm/dd/yyyy)

Role Effective Date: 07/01/2015
Relationship: GRANDPARENT(S)
Associate Type: FAMILY MEMBER

Person Associate Roles [Add New Associate Role](#)

no data found

Added by TRAINING02 on 08/20/2015 11:39:49
* Indicates Required

Address Information List

View/Modify	Type	Address	City	County Name	Primary Phone	Alternate Phone	Cell Phone	E-Mail Address	Effective Date	Termination Date
<input checked="" type="checkbox"/>	RESIDENTIAL	UNKNOWN	ALBUQUERQUE	OUT OF STATE COUNTY	555-123-4567	--	--		07/01/2015	

row(s) 1 - 1 of 1

Address Information Associate [Save Address](#)

Please Note: Enter address information if known.
Enter Unknown if you do not know the street address.

Address Type:

Effective Date:

Street:
City:
County:
State:
Zip:

Primary Phone: Alternate Phone:
Cell Phone:
Email:

Continued on next page

Edit Associate Person Information, continued

Edit the Person Information
Associate region

Step	Action	Result
3.	Make the desired changes in the Person Information Associate region.	The name and Gender can be changed.
4.	Click on the Save Person Information button.	Changes made to the Person Information Associate region are saved.

Edit the Address Information List region

Three types of address updates can be made:

- Add a new address
- Edit/update an existing address
- Terminate an address

Add New Address

Follow the steps in the table below to enter a new address for an Associate.

Enter a New Address										
Step	Action					Result				
1.	If not already open, click on the associate's KAMIS ID link to access their person information.					The associate's Person Admin page displays.				
2.	Enter the new information in the blank Address Information Associate region.					The Address Type, Effective Date, and Street fields are required.				

Address Information List

View/Modify	Type	Address	City	County Name	Primary Phone	Alternate Phone	Cell Phone	E-Mail Address	Effective Date	Termination Date
	RESIDENTIAL	UNKNOWN	ALBUQUERQUE	OUT OF STATE COUNTY	555-123-4567	--	--		07/01/2015	

row(s) 1 - 1 of 1

Address Information Associate

Save Address

Please Note: Enter address information if known.
Enter Unknown if you do not know the street address.

* Address Type

* Effective Date

* Street

City

County

State

Zip

Primary Phone Alternate Phone

Cell Phone

Email

1.	Click on the Save Address button.	The Address Information List is updated to display the new address, and the Address Information Associate region clears.
----	--	--

Continued on next page

Edit Associate Person Information, continued

Add New Address

continued

Enter a New Address (continued)

New (business) address saved to the Address Information List:

Address Information List

View/Modify	Type	Address	City	County Name	Primary Phone	Alternate Phone	Cell Phone	E-Mail Address	Effective Date	Termination Date
	BUSINESS	--		NOT ENTERED	555-555-1234	--	--		08/01/2015	
	RESIDENTIAL	UNKNOWN	ALBUQUERQUE	OUT OF STATE COUNTY	555-123-4567	--	--		07/01/2015	

row(s) 1 - 2 of 2

Address Information Associate

[Save Address](#)

Please Note: Enter address information if known.
Enter Unknown if you do not know the street address.

* Address Type ~ Select ~

* Effective Date

* Street

City

County

State

Zip

Primary Phone Alternate Phone

Cell Phone

Email

Edit/Update Existing Address

Follow the steps in the table below to update an Associate's existing address.

Update an Existing Address		
Step	Action	Result
1.	If not already open, click on the associate's KAMIS ID link to access their person information.	The associate's Person Admin page displays.
2.	In the Address Information List, click on the View/Modify icon of the address entry to be updated.	The Address Information Associate region populates with the selected address. Note: The address will not display in the Address Information List when it is being modified.
3.	Edit the address as necessary.	The Address Type and Effective Date cannot be changed. (See Note below)

Continued on next page

Edit Associate Person Information, continued

Edit/Update *continued*

Existing Address

Update an Existing Address (continued)		
Step	Action	Result
4.	Click on the Save Address button.	The original address is terminated and displays with the Termination Date. The updated address is added to the Address Information List as the current address.

Address Information List

View/Modify	Type	Address	City	County Name	Primary Phone	Alternate Phone	Cell Phone	E-Mail Address	Effective Date	Termination Date
	BUSINESS	--		NOT ENTERED	555-555-1234	--	--		08/01/2015	
	RESIDENTIAL	UNKNOWN	ALBUQUERQUE	OUT OF STATE COUNTY	555-123-4567	--	--		07/01/2015	

row(s) 1 - 2 of 2

Address Information List

[Add Address](#)

View/Modify	Type	Address	City	County Name	Primary Phone	Alternate Phone	Cell Phone	E-Mail Address	Effective Date	Termination Date
	RESIDENTIAL	UNKNOWN	ALBUQUERQUE	OUT OF STATE COUNTY	555-123-4567	--	--		07/01/2015	

row(s) 1 - 1 of 1

Address Information Associate

Save Address

Please Note: Enter address information if known.
Enter Unknown if you do not know the street address.

Termination Date (mm/dd/yyyy)

* Address Type BUSINESS

* Effective Date 08/01/2015

* Street

City SANTA FE

County ZZ - OUT OF STATE COUNTY

State NM - NEW MEXICO

Zip

Primary Phone 5555551234

Alternate Phone

Cell Phone

Email

Address Information List

View/Modify	Type	Address	City	County Name	Primary Phone	Alternate Phone	Cell Phone	E-Mail Address	Effective Date	Termination Date
	BUSINESS	--	SANTA FE	OUT OF STATE COUNTY	555-555-1234	--	--		08/20/2015	
	BUSINESS	--		NOT ENTERED	555-555-1234	--	--		08/01/2015	08/20/2015
	RESIDENTIAL	UNKNOWN	ALBUQUERQUE	OUT OF STATE COUNTY	555-123-4567	--	--		07/01/2015	

row(s) 1 - 3 of 3

Note: If it is determined that a new address needs to be added rather than editing the existing address, click on the 'Add Address' button in the Address Information List region to open a new blank Address Information Associate entry region.

Continued on next page




Edit Associate Person Information, continued

Terminate Address

Follow the steps in the table below to terminate an Associate's address.

Terminate an Existing Address		
Step	Action	Result
1.	If not already open, click on the associate's KAMIS ID link to access their person information.	The associate's Person Admin page displays.
2.	Click on the View/Modify icon of the address entry to be terminated.	The Address Information Associate region populates with the selected address. Note: The address will not display in the Address Information List while it is being edited.
1.	Enter the Termination Date of the address.	Enter in MM/DD/YYYY format.
2.	Click on the Save Address button.	The address is added back to the Address Information List, with the Termination Date.

Address Information List

View/Modify	Type	Address	City	County Name	Primary Phone	Alternate Phone	Cell Phone	E-Mail Address	Effective Date	Termination Date
	BUSINESS	8012 S 15TH AVE NE	HOUSTON	OUT OF STATE COUNTY	888-777-6666	--	--		08/04/2015	
	BUSINESS	8012 S 15TH AVE NE	COLLEGE STATION	OUT OF STATE COUNTY	888-777-6666	--	--		08/01/2015	08/04/2015
	RESIDENTIAL	UNKNOWN	ALBUQUERQUE	OUT OF STATE COUNTY	--	--	--		07/01/2015	

row(s) 1 - 3 of 3

Address Information Associate

Please Note: Enter address information if known.
Enter Unknown if you do not know the street address.

Termination Date (mm/dd/yyyy)

* **Address Type** BUSINESS

* **Effective Date** 08/05/2015

* **Street** 8012 S 15TH AVE NE

City HOUSTON

County ZZ - OUT OF STATE COUNTY

State TX - TEXAS

Zip 88888




Primary Phone 8887776666 **Alternate Phone**

Cell Phone

Email

Save Address

Address Information List

View/Modify	Type	Address	City	County Name	Primary Phone	Alternate Phone	Cell Phone	E-Mail Address	Effective Date	Termination Date
	BUSINESS	8012 S 15TH AVE NE	HOUSTON	OUT OF STATE COUNTY	888-777-6666	--	--		08/05/2015	08/05/2015
	BUSINESS	8012 S 15TH AVE NE	COLLEGE STATION	OUT OF STATE COUNTY	888-777-6666	--	--		08/01/2015	08/05/2015
	RESIDENTIAL	UNKNOWN	ALBUQUERQUE	OUT OF STATE COUNTY	111-222-3333	--	--		07/01/2015	

row(s) 1 - 3 of 3

Terminate an Associate and Customer Association

Introduction

If an association between a customer and an associate is no longer valid, the Associate should be terminated from the customer's Person Admin/Associates and Affiliations page. For example, if the customer's Durable Power of Attorney (DPOA) changes, or a family member who was listed as an emergency contact dies, those associates should be terminated.

Terminating an Associate does not affect any associations they may have with other customers.

How to

Follow the steps in the table below to terminate the association between a customer and an associate.

Step	Action	Result
1.	Navigate to the customer's Person Admin/Associates and Affiliations page.	The Person Admin/Associates and Affiliations page displays.
2.	Click on the KAMIS ID link of the Associate to be terminated.	The Associate Person Admin page displays. Note: If the Associate has more than one associate type, click on the link of the one to be terminated. If all associations are to be terminated for the Associate, it does not matter which is selected.

First	Middle	Last	Relationship	Associate Type	Associate Effective Date	Term Date	KAMIS ID Click to Edit Assoc. Person Info.
NANCY	-	GRIBBLE	MOTHER	EMERGENCY CONTACT	03/01/2015	-	30013789
LAURA	-	HICKS	AUNT	FAMILY MEMBER	08/03/2015	-	30016694
WIBB	J	HICKS	GRANDPARENT (S)	FAMILY MEMBER	07/01/2015	-	30741183

1 - 3

First Name Last Name

Person Information Associate

Person Nbr: 30016694

NAME: LAURA HICKS
(first) (middle - optional) (last)

Person Effective Date: 08/03/2015

Person Initial Role: ASSOCIATE

Gender:

Create Person Source: KAMIS Age:

Associate Person Term Date:

Associate Roles

Termination Date (mm/dd/yyyy): 08/03/2015

Role Effective Date: 08/03/2015

Relationship: AUNT

Associate Type: FAMILY MEMBER

Person Associate Roles

no data found

Added by TRAINING02 on 08/03/2015 11:56:16


* Indicates Required

Continued on next page

Terminate an Associate and Customer Association, continued

How to

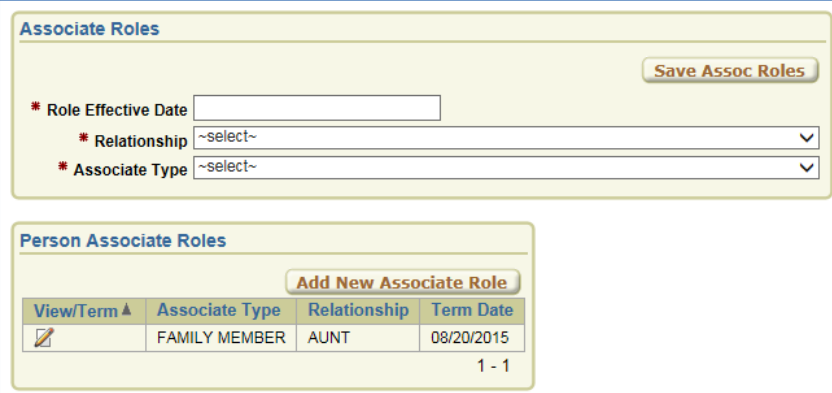
continued

Step	Action	Result
3.	Enter the Termination Date	Enter in MM/DD/YYYY format.
	 <p>Note: Because this associate has only one Associate Role, and it is being edited, the Person Association Roles region has no additional roles to display, so the 'no data found' message displays.</p>	
4.	Click on the Save Term Date button.	The association is terminated and the Person Associates Roles region is updated to reflect the change.

After a single association has been terminated:

Associate has no Associate Roles, so entry screen provided to add one

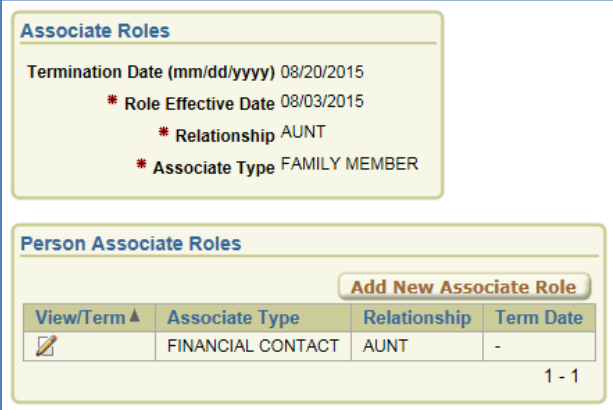
Terminated Associate Role



After one of two associations have been terminated:

Terminated Associate Role

Additional Associate Role, still active.



Continued on next page

Terminate an Associate and Customer Association, continued

How to

continued

Step	Action	Result
5.	If an additional role for this Associate needs to be terminated, click on the View/Term icon of the additional role in the Person Associates Roles region.	The active associate role information moves to the Associate Roles region to be updated, and the already terminated associate role moves down to the Person Associate Roles region table.

The diagram illustrates the process of terminating an associate role. It shows two screenshots of the system interface. In the first screenshot, the 'Person Associate Roles' table contains a row for 'FINANCIAL CONTACT' with a 'View/Term' icon. A red arrow points from this icon to the 'Associate Roles' form. In the second screenshot, the 'Associate Roles' form shows the 'FINANCIAL CONTACT' role being updated, with a 'Save Term Date' button. A blue arrow points from the 'Associate Roles' form back to the 'Person Associate Roles' table, where the role is now listed as 'FAMILY MEMBER' with a 'Term Date' of '08/20/2015'.

Associate Roles

Termination Date (mm/dd/yyyy) 08/20/2015

- * Role Effective Date 08/03/2015
- * Relationship AUNT
- * Associate Type FAMILY MEMBER

Person Associate Roles

Add New Associate Role

View/Term ▲	Associate Type	Relationship	Term Date
	FINANCIAL CONTACT	AUNT	-

1 - 1

Associate Roles

Save Term Date

Termination Date (mm/dd/yyyy)

- * Role Effective Date 08/03/2015
- * Relationship AUNT
- * Associate Type FINANCIAL CONTACT

Person Associate Roles

Add New Associate Role

View/Term ▲	Associate Type	Relationship	Term Date
	FAMILY MEMBER	AUNT	08/20/2015

1 - 1

Continued on next page

Terminate an Associate and Customer Association, continued

How to

continued

Step	Action	Result
6.	Enter the Termination Date for the additional associate role and click on the Save Term Date button.	The second associate role is terminated, added to the Person Associate Roles region table, and a new, blank Associate Roles entry region displays (because this person now has no active associations to the customer.)

The screenshot shows two sections. The top section, titled "Associate Roles", contains a "Save Assoc Roles" button and three fields: "Role Effective Date" (text input), "Relationship" (dropdown menu showing "~select~"), and "Associate Type" (dropdown menu showing "~select~"). The bottom section, titled "Person Associate Roles", contains an "Add New Associate Role" button and a table with columns: "View/Term", "Associate Type", "Relationship", and "Term Date". The table lists two entries: "FAMILY MEMBER" with relationship "AUNT" and term date "08/20/2015", and "FINANCIAL CONTACT" with relationship "AUNT" and term date "08/20/2015". A "1 - 2" indicator is at the bottom right of the table.

7.	Click on the Return button at the top of the Associate Person Admin page.	The customer's Associates and Affiliations page displays, with the terminated associate record(s) displayed in the Listing of Associates table with the previously entered Term Date(s).
----	--	--

The screenshot shows the "Associate Person Admin" page. At the top, it displays "KAMIS ID: 30013788 Name: GRIBBLE" and "Primary PSA JOHNSON CO AAA". A "Return" button is highlighted with a red box. Below this, the "Person Information Associate" section shows "Person Nbr: 30016694" and "NAME: LAURA". The "Person Effective Date" is "08/03/2015" and the "Person Initial Role" is "ASSOCIATE". The "Associate Person Term Date" is empty. The "Associate Roles" section is partially visible. The "Listing of Associates" table is shown with columns: "First", "Middle", "Last", "Relationship", "Associate Type", "Associate Effective Date", "Term Date", and "KAMIS ID". The table lists three entries: "NANCY - GRIBBLE MOTHER EMERGENCY CONTACT 03/01/2015 - 30013789", "LAURA - HICKS AUNT FINANCIAL CONTACT 08/03/2015 08/20/2015 30016694", and "LAURA - HICKS AUNT FAMILY MEMBER 08/03/2015 08/20/2015 30016694". The last two entries are highlighted with a red box. A "WIBB J HICKS GRANDPARENT (S) FAMILY MEMBER 07/01/2015 - 30741183" entry is also visible. A "1 - 4" indicator is at the bottom right of the table.

IDD Additional Info

Introduction

The **IDD Additional Info** secondary tab of Person Admin is only accessible by those users that have the proper security access for IDD waiver information.

Some of the information from this page also appears in the BASIS Assessment for IDD customers.


The IDD Additional Info page consists of two regions – **Disabilities Information** and **Residential & Day Program Information**. All fields marked with a red asterisk (*) are required and must be completed in order to save the page.

Disabilities Information

Example:

The screenshot displays the 'Disabilities Information' form. It includes several sections: 'Identified Disabilities' with a shuttle box moving items like 'AUTISM' and 'MENTAL RETARDATION' to a selected list containing 'CEREBRAL PALSY' and 'EPILEPSY / SEIZURE DISORDER'; 'Other Description' as a text field; 'Primary Disability' as a dropdown menu currently set to 'CEREBRAL PALSY'; 'Special Population' with a shuttle box moving items like 'CIP' and 'CHILD IN CUSTODY'; 'Psychiatric Diagnosis' with a list of medical codes and a shuttle box; and assessment sections for 'Intellectual Assessment' (MILD), 'Hearing Assessment' (NORMAL), and 'Vision Assessment' (MODERATE IMPAIRMENT). A red box labeled 'Shuttle Box selection' with arrows points to the shuttle boxes in the 'Identified Disabilities', 'Special Population', and 'Psychiatric Diagnosis' sections.

How to use the shuttle box to select one or more items from the list:

- Double-click on the item in the left box (not 'selected') to move it to the right box ('selected')
- OR
- Click once on the item in the left box and then click on the single select icon  to move it to the right box.

Continued on next page

IDD Additional Info, continued

Residential & Day Program Information

Example:

Residential & Day Program Information

County of Origin: --

* Residential Status: LIVING WITH RELATIVES

* Day Programs:

- ☐ ATTENDS SCHOOL IN A CLASSROOM 50% OR MORE OF THE DAY WITH PEOPLE WHO ARE NOT MR/DD
- ☐ ATTENDS SCHOOL IN A CLASSROOM LESS THAN 50% OF THE DAY, WITH PEOPLE WHO ARE NOT MR/DD
- ☒ GENERIC COMMUNITY ACTIVITIES LESS THAN 20 HOURS PER WEEK
- ☐ GENERIC COMMUNITY ACTIVITIES 20 HOURS OR MORE PER WEEK
- ☐ WORK ENVIRONMENT DESIGNED FOR PERSONS WITH MR/DD LESS THAN 20 HOURS PER WEEK
- ☐ WORK ENVIRONMENT DESIGNED FOR PERSONS WITH MR/DD 20 OR MORE HOURS PER WEEK
- ☐ COMPETITIVE EMPLOYMENT LESS THAN 20 HOURS PER WEEK
- ☒ COMPETITIVE EMPLOYMENT 20 OR MORE HOURS PER WEEK
- ☐ AGENCY BASED NON-WORK ACTIVITIES LESS THAN 20 HOURS PER WEEK
- ☐ AGENCY BASED NON-WORK ACTIVITIES 20 OR MORE HOURS PER WEEK
- ☐ OTHER

Day Program Other Description:

Save Completed Form

After all required fields and any optional fields are completed/selected, click on the Save button to save the selections.

Person Search | **Person Admin**

Home | Associates and Affiliations | **IDD Additional Info** | SUD Additional Info | SED Additional Info

Disabilities Information

* Identified Disabilities:

AUTISM
MENTAL RETARDATION
OTHER

CEREBRAL PALSY
EPILEPSY / SEIZURE DISORDER

Other Description:

Primary Disability: CEREBRAL PALSY

Special Population:

CIP
CHILD IN CUSTODY
SELF-DIRECTED CARE
SELF-DETERMINATION
SPECIAL CARE RATE

Psychiatric Diagnosis:

290.0_1 - Dementia-Alzheimer's Type,W/Late Onset,Uncomplicated
290.0_2 - Dementia-Alzheimer's Type,Late Onset,Uncomplebehav Dis
290.10_1 - Dementia Due To Creutzfeldt-Jakob Disease
290.10_2 - Dementia Due To Pick's Disease
290.10_3 - Dementia,Alzheimer's Type,W/Early Onset,Uncomplebehav

Intellectual Assessment: MILD

* Hearing Assessment: NORMAL

* Vision Assessment: MODERATE IMPAIRMENT

Residential & Day Program Information

County of Origin: --

* Residential Status: LIVING WITH RELATIVES

* Day Programs:

- ☐ ATTENDS SCHOOL IN A CLASSROOM 50% OR MORE OF THE DAY WITH PEOPLE WHO ARE NOT MR/DD
- ☐ ATTENDS SCHOOL IN A CLASSROOM LESS THAN 50% OF THE DAY, WITH PEOPLE WHO ARE NOT MR/DD
- ☒ GENERIC COMMUNITY ACTIVITIES LESS THAN 20 HOURS PER WEEK
- ☐ GENERIC COMMUNITY ACTIVITIES 20 HOURS OR MORE PER WEEK
- ☐ WORK ENVIRONMENT DESIGNED FOR PERSONS WITH MR/DD LESS THAN 20 HOURS PER WEEK
- ☐ WORK ENVIRONMENT DESIGNED FOR PERSONS WITH MR/DD 20 OR MORE HOURS PER WEEK
- ☐ COMPETITIVE EMPLOYMENT LESS THAN 20 HOURS PER WEEK
- ☒ COMPETITIVE EMPLOYMENT 20 OR MORE HOURS PER WEEK
- ☐ AGENCY BASED NON-WORK ACTIVITIES LESS THAN 20 HOURS PER WEEK
- ☐ AGENCY BASED NON-WORK ACTIVITIES 20 OR MORE HOURS PER WEEK
- ☐ OTHER

Day Program Other Description:

Cancel

Save

SED Additional Info

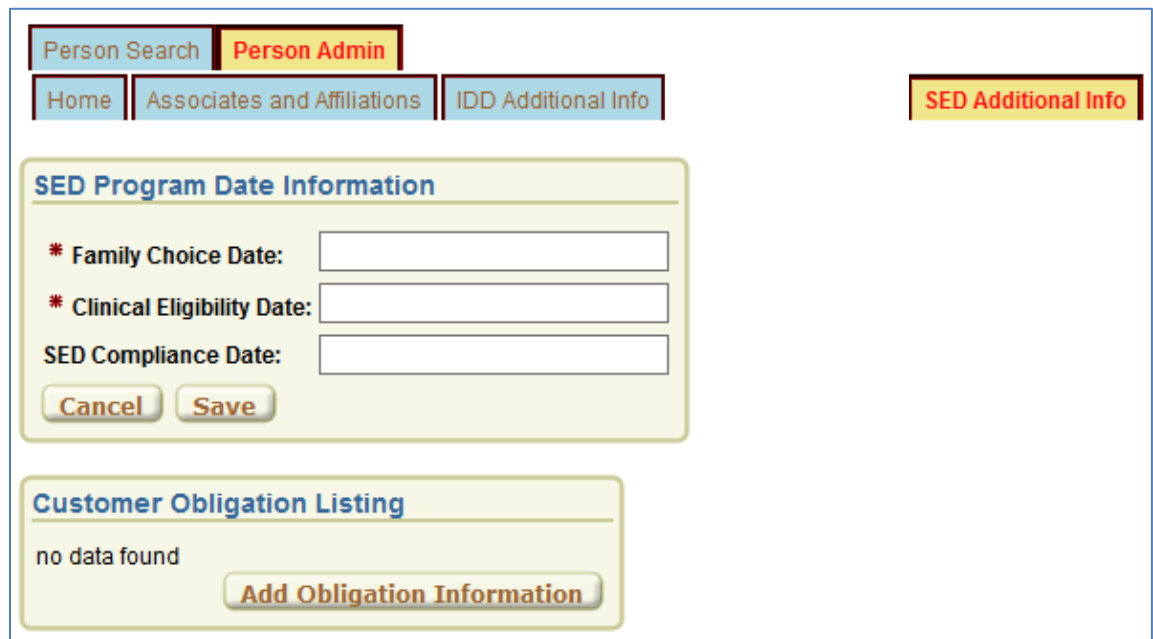
Introduction

The **SED Additional Info** secondary tab of Person Admin is only accessible by those users that have the proper security access for SED waiver information.

The **Family Choice Date** and **Clinical Eligibility Date** must be completed in order to save any SED Assessment added to the customer's forms list.

The SED Additional Info page consists of two regions – **SED Program Date Information** and **Customer Obligation Listing**. All fields marked with a red asterisk (*) are required and must be completed in order to save the page.

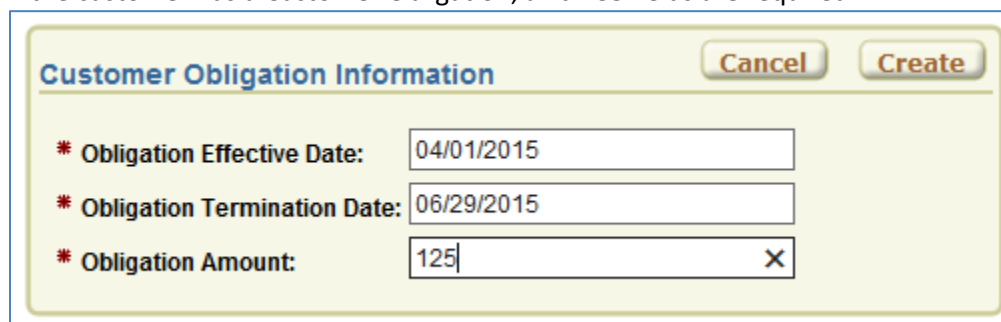
Blank SED Additional Info Page



The screenshot shows the 'Person Admin' interface with the 'SED Additional Info' tab selected. The 'SED Program Date Information' section contains three required date fields: 'Family Choice Date', 'Clinical Eligibility Date', and 'SED Compliance Date', each with a 'Cancel' and 'Save' button. The 'Customer Obligation Listing' section displays 'no data found' and an 'Add Obligation Information' button.

Customer Obligation Listing

If the customer has a Customer Obligation, all three fields are required:



The screenshot shows the 'Customer Obligation Information' form with three required fields: 'Obligation Effective Date' (04/01/2015), 'Obligation Termination Date' (06/29/2015), and 'Obligation Amount' (125). The 'Obligation Amount' field has a red 'X' icon indicating a validation error. The form includes 'Cancel' and 'Create' buttons.

The Customer Obligation Information region has its own Create/Save button. The Obligation Amount should be entered in whole numbers. If a decimal amount is entered, the number will be rounded to the nearest dollar when the obligation information is created (saved.)

Continued on next page

SED Additional Info, continued

Customer Obligation Listing, continued

After the Customer Obligation information has been created (saved), the **Customer Obligation Listing** region shows the information in a table.

The screenshot shows a web interface titled "Customer Obligation Listing". It contains a table with the following data:

Edit	Waiver	Obligation Amt	Obligation Effective Date	ObligationTerm Date
	SEVERE EMOTIONAL DISTURBANCE	125	04/01/2015	06/29/2015

Below the table, on the right, is the text "1 - 1" and a button labeled "Add Obligation Information".

Edit Customer Obligation

Follow the steps in the table below to edit a saved Customer Obligation:

Step	Action	Result
1.	If not already there, navigate to the customer's Person Admin/SED Additional Info page.	The SED Additional Info page displays, with the Customer Obligation Listing table containing the customer obligation record.

The screenshot shows the "SED Additional Info" page for a customer named JETSON, JEB. At the top, it displays "KAMIS ID: 200353720", "Name: JETSON, JEB", "Customer Status: ACTIVE", and a link "More Person Info...". Below this, it shows "Primary PSA: NORTHWEST KANSAS AAA" and "No Secondary PSAs".

There are several tabs: "Person Search", "Person Admin" (which is selected), "Home", "Associates and Affiliations", "IDD Additional Info", and "SED Additional Info" (which is highlighted in red).

Under the "SED Additional Info" tab, there is a section titled "SED Program Date Information" with the following fields:

- * Family Choice Date: 04/01/2015
- * Clinical Eligibility Date: 04/01/2015
- SED Compliance Date: (empty field)

Below these fields are "Cancel" and "Save" buttons.

At the bottom of the page, there is a "Customer Obligation Listing" table, which is identical to the one shown in the previous screenshot. The "Edit" button (with the edit icon) in the first row of the table is highlighted with a red box.

Continued on next page

SED Additional Info, continued

Edit Customer Obligation

continued

Step	Action	Result
2.	Click on the Edit icon next to the obligation to be updated.	The Customer Obligation Information change page displays.

Customer Obligation Information

Cancel

Apply Changes

* Obligation Effective Date:

04/01/2015

* Obligation Termination Date:

06/29/2015

* Obligation Amount:

125

3.	Make the desired changes.	
4.	Click on the Apply Changes button.	The changes are saved and the SED Additional Info page displays with an 'Action Processed' message at the top of the page. The updated customer obligation displays in the Customer Obligation Listing table.

KAMIS ID: 200353720 Name: JETSON, JEB Customer Status: ACTIVE [More Person Info...](#)
Primary PSA NORTHWEST KANSAS AAA No Secondary PSAs

Action Processed.

Person Search

Person Admin

Home

Associates and Affiliations

IDD Additional Info

SUD Additional Info

SED Additional Info

SED Program Date Information

* Family Choice Date:

04/01/2015

* Clinical Eligibility Date:

04/01/2015

SED Compliance Date:

Cancel

Save

Customer Obligation Listing

Edit	Waiver	Obligation Amt	Obligation Effective Date	ObligationTerm Date
	SEVERE EMOTIONAL DISTURBANCE	115	04/01/2015	06/29/2015

1 - 1

Add Obligation Information